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AN  
EVALUATION ASSESSMENT  
OF THE  
SERVICE BUREAUX PILOT PROGRAM

*The DPA Group Inc.*







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OF THE  
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**DISCUSSION DRAFT**

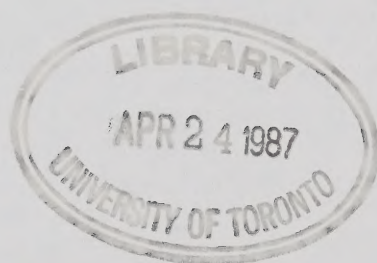
PREPARED FOR:

The Task Force on  
Service to the Public  
Supply and Services Canada

PREPARED BY:

DPA Consulting Ltd.  
October 1981


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## EXECUTIVE SUMMARY

### Section (page)

The focus of the Service Bureaux pilot program is to test alternative means of enquiry service in improving the Canadian public's access to its federal government. The Service Bureaux role is to provide a supplementary linkage mechanism between the public and the federal government to facilitate improved access to federal programs and services.

1.1 (1-2)

As a condition of the funding commitment to the Task Force, Treasury Board stipulated a requirement for an evaluation of the Service Bureaux pilot program to be conducted prior to further funding. While funding has since been extended to October 1982, the purpose in undertaking an Evaluation Assessment at this time was to present management of the pilot experiment a selected range of evaluation issues, approaches and options for consideration as an aid to providing the best experimental results possible. The Task Force retained DPA Consulting Limited to conduct this study.

During the course of the assessment, a profile of the Service Bureaux pilot program was developed. Included in this profile were reviews of the mandate for this initiative, the objectives of the pilot experiment, the experience to date, and as well, a preliminary assessment of the program's performance. Three (3) modules of the Service Bureaux pilot were developed:

2.0 (5-13);  
Appendix 'B'

- Program Logic Model;
- Program Context Model;
- Program Hypotheses Model

3.1 (14)

3.2 (15-16)

3.3 (17-18)





Interviews were limited to Task Force personnel at management's request. The information obtained in these interviews served two purposes. The first purpose was to provide the basis for a preliminary assessment of program performance to date. Our findings included:

4.0 (19-21);  
APPENDIX 'D'

- There appears to be considerable consensus that promoting and facilitating the Canadian public's access to the Federal Government is a desirable objective.
- There is a need to clarify the role of the Canada Service Bureaux in several policy and activity areas.
- Field resources find that the absence of more definitive directions from and communication with the Task Force is a concern.
- The public is not aware of the Service Bureaux pilot program.
- Advertising/promotion must be an integral element of the experimental approach adopted in the pilot project.

The other purpose of the interviews was to focus on evaluation issues.

Fourteen (14) evaluation issues were identified (see: Opposite page). These issues cover the range of evaluation considerations under the OCG Guide on the Program Evaluation Function.

5.0 (22-40)

For purposes of management convenience the issues were grouped under three(3) program issue headings: Program Design, Service Level and Program/Related Dynamics.





Resources for the pilot project are provided to the Task Force by Cabinet decision and Supply and Services Canada based on Treasury Board submissions. As a condition of the original funding commitment for the Service Bureaux pilot project, Cabinet required the Task Force to report on the status of the project by January 1982. In recognition of this reporting requirement, management of the Task Force decided to conduct an Evaluation Assessment of the activities of the pilot project, as a first step toward evaluation.

Proposals were called by the Assistant Director, Access, of the Task Force on Service to the Public and DPA Consulting Limited was retained to conduct the Evaluation Assessment. The purpose of this report is to present the findings and recommendations resulting from the Evaluation Assessment conducted.

## 1.2 Purpose and Scope

The purpose of this study was to conduct an Evaluation Assessment of the Service Bureaux pilot project and to present to management of the Task Force on Service to the Public a selected range of evaluation issues and evaluation options for consideration. In accordance with the guidelines established by the Office of the Comptroller General on the program evaluation function, the study was designed to provide the following products:

- . A program component profile including the legal basis, activities, products and structure of the program component, showing the causal linkages within the program;
- . A model of the program components covering: objectives, activities, products and general structure;
- . A list of relevant evaluation issues;
- . A number of possible evaluation options including a description of the techniques to be used and the estimated resources and time requirements for each option;





- . Criteria to be used by Task Force management to determine the most appropriate evaluation option;
- . A recommendation on the option considered most appropriate by the evaluation team, including the rationale for the recommended option; and,
- . Broad terms of reference based on the selected option to assist Task Force management in the conduct of the subsequent evaluation.

Under the reporting constraints of the Task Force, the study was initiated in late August 1981 and targeted for completion by the end of the fourth week in September. Fact finding in the Evaluation Assessment was limited to members of the Task Force, both in Head Office and in the field.

### 1.3 Approach

The study was divided into four major stages (Appendix B: Study Work Plan):

Stage I:	Development of Program Component Profile and Context Model(s)
Stage II:	Assessment of Program Structure and Identification of Evaluation Issues
Stage III:	Development of Evaluation Options
Stage IV:	Development of Terms of Reference

A steering committee composed of the Assistant Director, Access and the Manager, Service Bureaux as well as a representative from the Office of the Comptroller General was established to monitor and to advise the project team as the study progressed.





At the end of each stage, the study team met with the steering committee to review progress and to secure key decisions (Appendix C: Minutes of Steering Committee Meetings).

A significant feature of the study approach involved extensive consultation with Task Force members and interviews at the field level. A standardized interview guide was developed covering the potential major evaluation issue areas as well as, the details of processes, resources and utilization. In addition, a small but representative sample of both Itinerant Officer Mobile operations and Service Bureaux facilities were visited.

In the course of the study the consultants interviewed:

- . 6 representatives of the Task Force on Service to the Public in Ottawa; and
- . 17 representatives of the field operations of the Service Bureaux pilot program.

Appendix D provides a list of interview contacts and the general format of the interview guide questions.

A number of pertinent documents, reports, correspondence and prior studies were reviewed by the consultants during the study. These are enumerated in Appendix E: List of Source Documents Reviewed.

At the conclusion of Stage III of the Work Plan, a range of evaluation options were presented to the Task Force. This interim report is included as Appendix F: Interim Report on Evaluation Issues and Options.





## 2.0 TASK FORCE/SERVICE BUREAUX PROGRAM COMPONENT PROFILE

### 2.1 Mandate and Objectives

The Task Force mandate for the Service Bureaux Pilot Project is found in the Task Force on Service to the Public Discussion Paper (July, 1980): --

- . To work with all departments in raising the quality of government service;
- . To improve communications between the public and the public service; and,
- . To make it easier for people to deal with the government.

The mandate presented in the Discussion Paper embraces three (3) major activities: --

- . Access to government (e.g. by telephone, through in-person visits, through Members of Parliament and production and distribution of an Index to Programs and Services)
- . Awareness of the Federal government role; and,
- . The supply and delivery of service and information.

The Minister of Supply and Services Canada reports to Cabinet periodically on the status and activities of the Task Force.

The objectives of the Service Bureaux Pilot Project are also stated in the Task Force on Service to the Public Discussion Paper (July, 1980): first, the pilot project is to assist the Task Force in meeting the Cabinet requirement "to determine the level of service, the cost effectiveness and market penetration levels required to meet the needs of Canadians."; second,





the pilot project is intended "to find ways and means of attacking the problem and to develop an approach to solving it."

## 2.2 Description

### 2.2.1 History

The Task Force Service Bureaux pilot project is not an isolated event, but rather one of a series of initiatives that evidence the Government's continuing concern with the ways it communicates with the Canadian public. The failure to communicate effectively was first noted by the Royal Commission on Government Organization (1962). In 1969 the Task Force on Government Information advocated that the Government create an entirely new kind of central agency, to be called Information Canada, around which a number of existing and potential information functions could cluster and through which the Government could focus its efforts to improve communications with the public.

Six years later, Information Canada was dismantled after an unsatisfactory experience. In 1977, Cabinet again sought a comprehensive analysis of the state of the art. The Treasury Board Task Force was established to examine the nature of the relationship between the federal public service and the public it serves.

The studies undertaken by the Task Force indicated that:

- . the public perceives major difficulties in gaining access to the Federal Government to obtain services and information;
- . there is a serious lack of awareness of federal programs and services;





- . there is uncertainty about the actual role of the Federal Government in the community; and,
- . the public views the Federal Government and the public service as indifferent, hostile and insensitive.

As a result of these findings and a general dissatisfaction with the image of the federal government as well as the public service, and to ensure that corrective action was taken, the current Task Force was established in late 1978.

The DSS Task Force on Service to the Public identified three (3) target areas for action: Access, Awareness and Service Delivery. The Awareness and Service Delivery components are in their formative stages. The Task Force has focused considerable attention however on attacking the problems that Canadians have in accessing and obtaining Federal Services and information.

Many respondents to earlier studies have indicated a preference in dealing with government on a face-to-face basis. Personal contact is considered better than the telephone when discussing the completion of forms, looking up pamphlets or discussing correspondence which may be causing problems. The Service Bureaux Pilot Project is designed to test this public need.

#### 2.2.2 Service Bureaux Pilot Project

The pilot project is comprised of four (4) modules including Service Bureaux (8), Satellite Bureaux (6), Itinerant Offices (8) and Information Carrells (30). Each of these points of Service have been placed in communities across Canada so as to maximize the range of economic and social strata involvement in the pilot project.



Each module of the pilot project is intended to provide enquirers with prompt, accurate referrals to Federal departments/agencies.

### 2.2.3 Delivery of the Project

The Task Force on Service to the Public received Cabinet approval of the Service Bureaux proposal in October, 1980. The First Service Bureaux was implemented in Edmonton in December, 1980. Accordingly, the Pilot Project is in only the most formative of stages. Since this time, the Task Force has focused attention on mounting a credible field project of Bureaux, Itinerant Offices and Carrells within very strict time constraints. Thirty Telidon-equipped carrells will be implemented in October 1981, placement of an additional sixty non-Telidon carrells is planned for the 1982-83 fiscal year. Exhibit 2 presents the Service modules and effective implementation dates.

The Manager, Service Bureaux provides national policy, administration and coordination of the Service Bureaux pilot project. Regional Managers are responsible for: --

- . delivery of service;
- . regional data bank development;
- . regional liaison with federal departments/agencies and other information services;
- . regional liaison with other federal departments/agencies e.g. DSS/supplies, PWC/accommodations;
- . facilities management, administration and immediate personnel supervision; and,
- . as appropriate, supervision of satellite bureaux and itinerant services.





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EXHIBIT 2: PILOT PROJECT SERVICE BUREAUX MODULES AND EFFECTIVE  
IMPLEMENTATION DATES

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<u>Service Bureaux Module/Location</u>	<u>Description/Observed Dynamic</u>	<u>Effective Date</u>
<u>Service Bureaux</u>		
Vancouver	Commercial Core	9/03/81
Edmonton	Active pedestrian	9/12/80
Regina	Heritage, Core	20/07/81
Winnipeg	Core shopping	15/07/81
Toronto	Core office/shopping	15/09/81
Quebec	Blue collar district	7/05/81
Halifax	Storefront, core	1/04/81
St. John's	Shopping, mall	1/08/81
<u>Satellite Bureaux</u>		
Victoria	Federal Building	1/08/81
Calgary	Federal Building	15/07/81
Saskatoon	Federal Building	1/08/81
Montreal	Core office/shopping	22/06/81
Moncton	Federal Building	20/07/81
Charlottetown	Federal Building	20/07/81
<u>Itinerant Services</u>		
Kelowna	Interior, B.C.	15/08/81
Gimli/Interlake	Rural/Industrial	1/08/81
North Bay	Northern Ontario	29/07/81
Sherbrooke	Eastern Townships	20/07/81
Matane	Gaspé Peninsula	27/07/81
Sydney	Cape Breton	6/07/81
Bathurst	Hinterland	23/09/81
Windsor	Central, Nfld.	15/08/81

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Exhibit 3 presents an organizational overview of the regional operations of the Service Bureaux pilot project.

Consistent with the experimental nature of the pilot project, the Task Force has created Service Bureaux in a variety of locations -- from major urban core shopping concourses to street level/store front accommodation in commercial/financial core districts -- to test possible key locational variables against the market determinants of demand, penetration, capacity and cost efficiency/effectiveness. Similarly, the pilot project Itinerant Services cover several types of smaller communities of 10,000-30,000 population in regular, scheduled tours. In the Interlake Region of Manitoba however, a unique dynamic is being tested as the Itinerants serve small communities of 1,000-3,000 in a mixed rural/light-industry setting.

The Vancouver Service Bureau is staffed by federal public servants; in all other cases, regional personnel are private sector employees.

Detailed records are maintained on each enquiry transaction and a statistical base is currently being developed by Regional Managers. The summary data available to the study team during the formative stages of the pilot project indicates a significant potential demand for an in-person federal enquiry/referral service. Data displayed in Exhibit 4 is from the Edmonton Service Bureau.



EXHIBIT 3: ORGANIZATIONAL OVERVIEW OF SERVICE BUREAUX  
PILOT PROJECT REGIONAL OPERATIONS

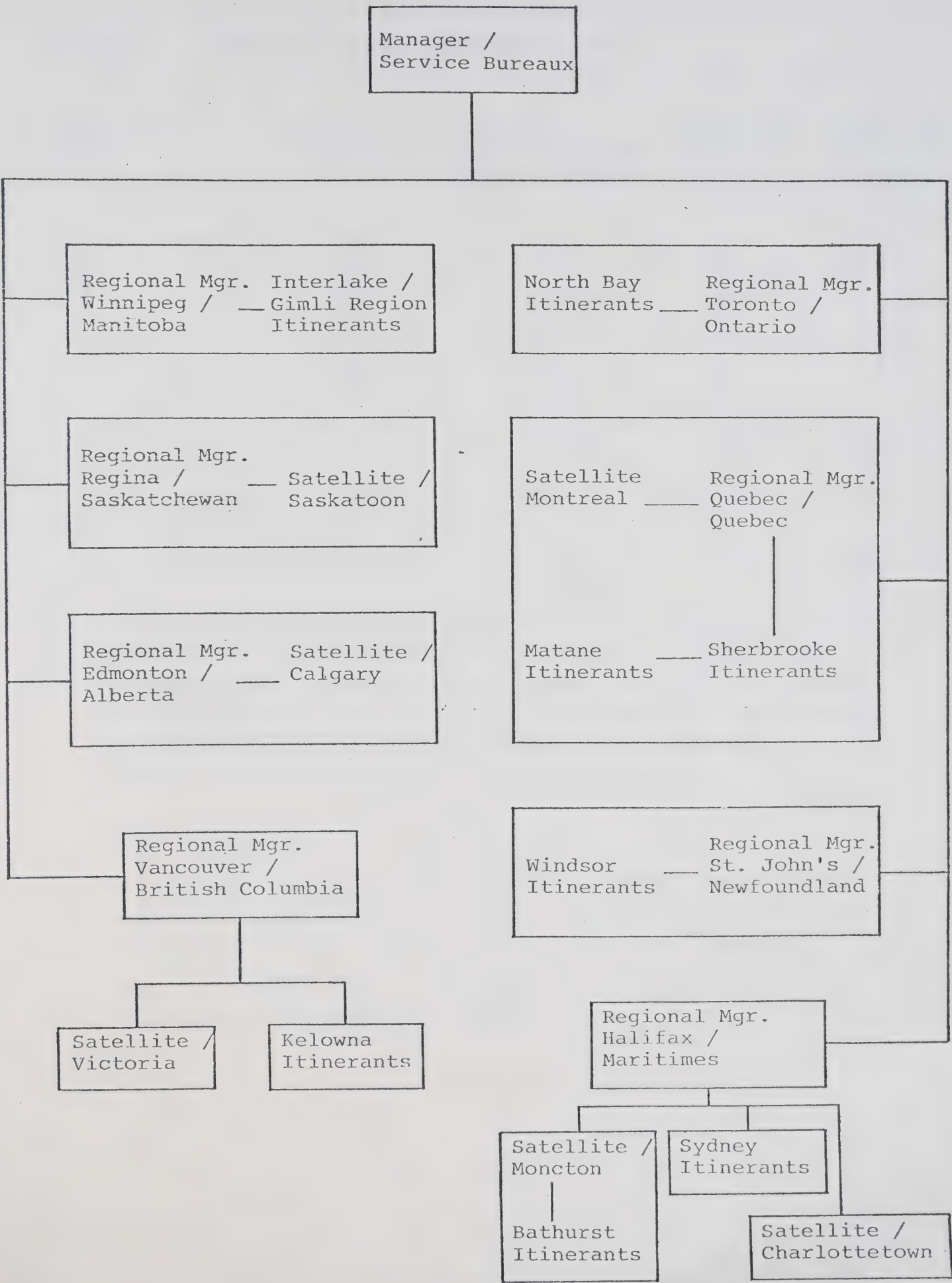






EXHIBIT 4 - EDMONTON OFFICE OPERATIONAL DATA

Operating Month	Volume of Enquiries	% Change In Enquiry Volumes Of Previous Mo.	Number of Staff	Enquiries/ Staff Day
1	249	-	2	5.9
2	353	41.8	2	8.8
3	388	9.9	3	5.9
4	265	(31.7)	3	4.4
5	302	14.0	3	5.0
6	437	44.7	3	6.6
7	384	(12.1)	4	4.4
8	300	(21.9)	4	3.6
Mean (Standard Deviation)	335 (66)	6.4 (30.0)	-	5.6 (1.63)
Periodic Growth Rate	2.7%			

The identification, advertising, and promotion of the Service Bureaux/Itinerants is an integral part of the Task Force pilot project. A national promotional strategy is currently being prepared by the Task Force. However until implemented, the promotion of the Service modules is restricted to official opening ceremonies and local signage.

### 2.3 Resources

The Service Bureaux pilot project is allocated Task Force resources through submissions to the Treasury Board and the Estimates of Supply and Services Canada. The resources include: person years, salaries, operating or non-salary expenses and professional services.





The Task Force is integrating its internal financial management operations with the Department's resource cycle and for the fiscal operating year 1982/83 the Task Force on Service to the Public will be included in the Department's Main Estimates Submission.

In the course of the Evaluation Assessment, available summary resource data were examined by the study team. Detailed financial statements for the Task Force Service Bureaux pilot project, Service Bureaux modules, Service Regions and Offices were not available at the time of the study, however work was underway to develop these reporting formats.

It was not possible within the study team's time frame to develop a detailed description of how management of the pilot project plans and controls expenditures and budgets from existing reports and documentation. Detailed DSS requisition statements were available, however these must be reclassified to provide the financial data required.



### 3.0 MODELS OF THE PROGRAM

#### 3.1 Program Logic Model

The Program Logic Model, Exhibit 5, was amended after consultation with Task Force management. In its amended form the Model received general approval from field personnel.

Three significant points emerge from an analysis of the model:

- . the General and Specific Outputs have been verified and evidence was found that, within the variations of approach permitted, each Bureau and Itinerant operation provided the output described;
- . although the Immediate, Intermediate and Long Term Impacts and Effects were those intended by the Program, little evidence exists of the ability of the Task Force to measure the levels of effects or their application to a continuing program of access to Federal services; and
- . Unintended impacts have not been reflected as the depth of the Assessment study did not permit access to affected groups, but an example might be the reactions from M.P.'s and their constituency office staffs.

The linkages of Objectives, Activities and Products to the Impacts and Effects Intended appear plausible. At the Intermediate and Immediate levels particularly, there was superficial evidence of objectives achievement in the provision of services. The evidence of achievement in providing pertinent data for analysis of the Program for future design was less apparent.





EXHIBIT 5: SERVICE BUREAUX PROGRAM LOGIC MODEL (TASK FORCE ON SERVICE TO THE PUBLIC)

<u>Task Force Mandate</u>	<u>Service Bureaux Program Objectives</u>	<u>Service Bureaux Activity Areas</u>	<u>General Outputs</u>
<p>To work with all departments in raising the quality of government service, to improve communications between the public and the public service and to make it easier for people to deal with the government. The mandate embraces three major areas:</p> <ul style="list-style-type: none"><li>- Access to government;</li><li>- Awareness of the Federal government role; and</li><li>- The supply and delivery of service and information.</li></ul>	<p>To determine the level of service, the cost effectiveness and market penetration levels required to meet the needs of Canadians.</p> <p>To find ways and means of attacking the problem and to develop an approach to solving it.</p>	<p>Administration of the Service Bureaux Program.</p> <p>Facilitating access and service to the public in metropolitan areas through in-person walk-in centres.</p> <p>Facilitating access and service to the public in smaller urban communities through provision of itinerant officers.</p> <p>Increasing public access to federal government services by establishing information carrells in prominent locations frequented by the public.</p>	<p>Support to and control of operations.</p> <p>Direct Service to the public.</p> <p>Referral of public to Federal and other government levels' services.</p> <p>Basic Information to the public. Liason and Service to Departments.</p>

(Cabinet Document, July 1980)

(Cabinet Document, July 1980)



# Intended Impacts and Effects

<u>Specific Outputs</u>	<u>Immediate</u>	<u>Intermediate</u>	<u>Long Term</u>
<ul style="list-style-type: none"> <li>-Budgets</li> <li>-Guidelines</li> <li>-Training</li> <li>-Staffing</li> <li>-Management</li> </ul>	<p>Daily operational advice and arrangement.</p>	<ul style="list-style-type: none"> <li>-Operating procedures and standards</li> <li>-Improvements in location and level of service</li> </ul>	<p>Improved service to the public at minimum cost</p>
<ul style="list-style-type: none"> <li>-Literature/Publications</li> <li>-Forms</li> <li>-Data Base Information</li> <li>-Names (addresses)</li> <li>-Telephone (e.g.MPs).</li> </ul>	<p>Satisfactory response to needs Partial response to needs Increased public awareness</p>	<p>Experiences with Pilot Project supports improvements to service policies and delivery</p>	<p>General public satisfaction levels improved on service provided.</p>
<ul style="list-style-type: none"> <li>-Literature</li> <li>-Verbal Information</li> <li>-Data Base Information</li> <li>-General Processes/Timing</li> </ul>	<p>Specific awareness level of public increased Satisfying simple basic information need Identifying source of information</p>	<p>Pilot Project findings identify more precise publics and their needs.</p>	<p>General public awareness levels improved on Federal services available.</p>
<ul style="list-style-type: none"> <li>-Directory Information</li> <li>-Transmittal of Request to appropriate source</li> <li>-Address/telephone no. of correct source</li> <li>-Follow-up action</li> </ul>	<p>Satisfactory referral completion Satisfactory access information provided Satisfactory awareness of services available to meet need Increased public understanding of specific processes</p>	<p>Public awareness of Federal services increases</p>	<p>Departments show improvement in service levels from pilot program effects and support coordination efforts.</p>
<ul style="list-style-type: none"> <li>-Effective referrals</li> <li>-Advise Departments on referrals received</li> <li>-Available display space</li> <li>-Publications</li> </ul>	<p>Improved access Improved awareness of public needs</p>	<p>Public satisfaction with services increases sufficiently to continue improvements.</p>	<p>Data Base is current, comprehensive, integrated and accessible.</p>
		<p>Departments recognize benefits of Service Bureau Program and increase liaison</p>	<p>Government Departments have increased knowledge of public's needs</p>
		<p>Data bank is improved because of successful use by public through pilot project.</p>	<p>Cabinet support the expansion of continuing improvements of service to the public</p>
		<p>Recommendations to Cabinet emanating from Pilot Project findings are accepted.</p>	





### 3.2 Program Context Model

The basic premise, displayed in Exhibit 6, is that the Canadian public requires a supplementary bridge to obtain access to Federal Services.

The use of the phrases "Informed Public" and "Uninformed Public" must be examined in the context of each transaction encountered. The same person could, under varying circumstances, be "Informed" in one situation and "Uninformed" in another.

It is the view of the study team that the Program rationale is anchored on the "bridging" premise. The current services being provided are to determine an optimum vehicle rather than to determine the public need for assistance. This is amplified in the Evaluation Options presented later.



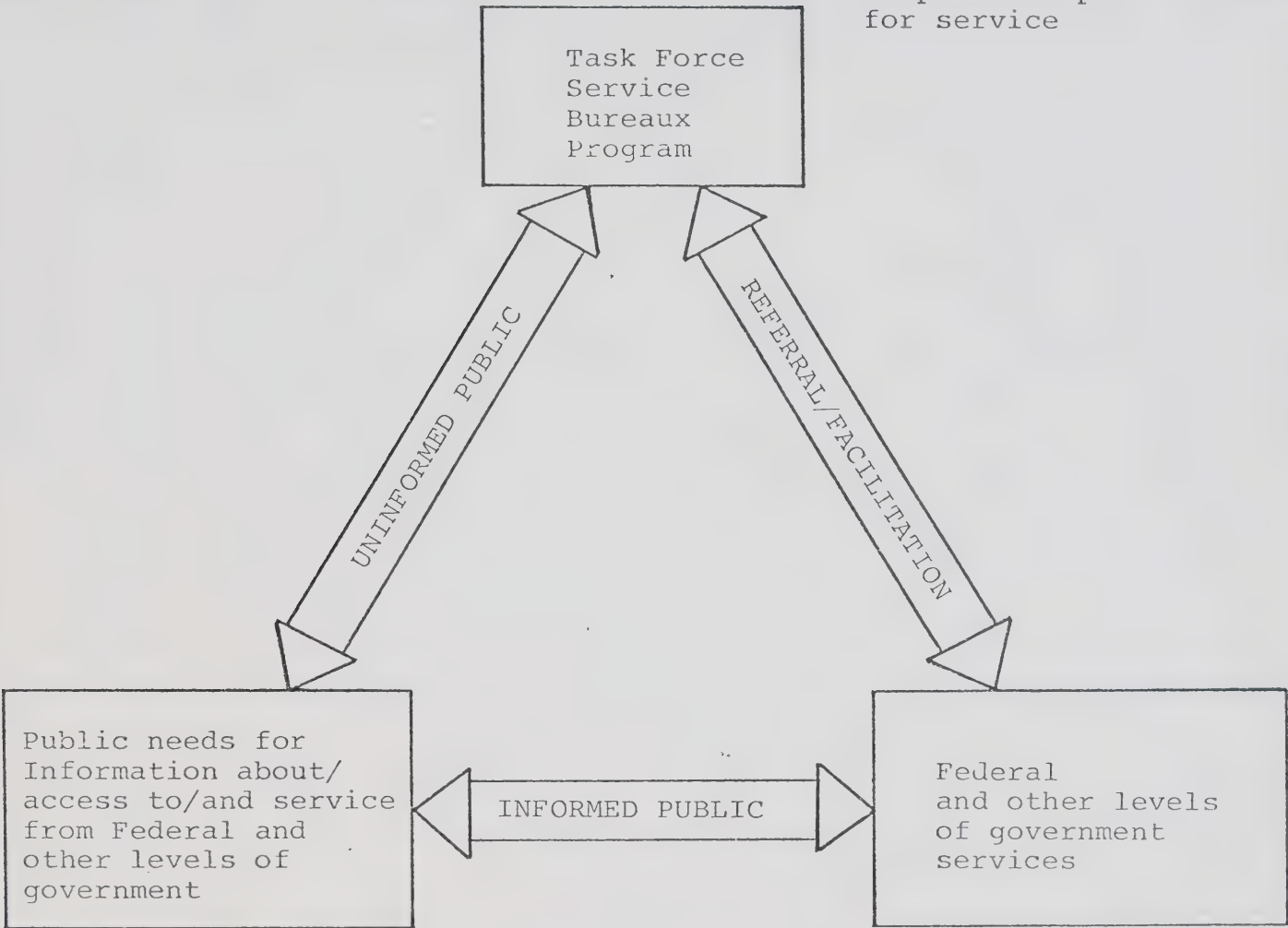
EXHIBIT 6: PROGRAM CONTEXT MODEL (TASK FORCE ON SERVICE TO THE PUBLIC)

Causal Hypothesis 1.

There are segments within the Canadian public that have needs for information and assistance in obtaining government services.

Causal Hypothesis 2.

A supplementary linkage mechanism between the public and government services is a necessary means to facilitate an improved government response to public needs for service



Members of the public may belong to either of the channels that are noted above in the flow of enquiries concerning government programs and services. Which channel the individual follows will depend on the specific issue at a particular point in time.





### 3.3 Program Hypothesis Model

The hypothesis model, presented in Exhibit 7, has been modified to reflect the bottom line requirement for data, upon which to determine the level of service and optimum delivery program for the future.

The use of a hypothesis structure is to provide a setting for the Program and upon which evaluation testing can be undertaken.









#### 4.0 PRELIMINARY ASSESSMENT FINDINGS

As indicated previously, in the course of the Evaluation Assessment, the study team conducted a number of formal interviews with individual members of the Task Force as well as a select sample of regional personnel in six (6) locations. These interviews were conducted primarily to assist in developing reasonable models of the pilot project, in describing its operation and developing Evaluation Issues. An initial sounding of the pilot project's performance, impacts and effects was also obtained. The data gathered from interviews during the Evaluation Assessment do not represent statistically valid or broad-based samples from which to draw specific conclusions about the actual or anticipated performance of the pilot project.

It was recognized in the study work plan that some preliminary assessment of the project would be useful to Task Force management. The following observations, from the comments collected through the interview and data gathering stages of the Evaluation Assessment attempt to provide insights. The key observations can be summarized as follows:

- . There appears to be considerable consensus that promoting and facilitating the Canadian public's access to the Federal Government is a desirable objective. Sample comments received included:
  - "... (we) are contributing to the perception of a visible and approachable Federal Government..."
  - "... (it is) essential to dispel the 'big they' of the Federal Government by emphasizing people and direct contact..."



. While there is agreement with this thrust as an objective statement, there is a need to clarify the role of the Canada Service Bureaux in a number of areas. Interviews with Task Force personnel identified the following areas of concern:

- referral role versus the information role;
- publications role as an aid to referral;
- liaison with Departments and Agencies;
- liaison with other levels of government;
- liaison with other community and Service groups in the information area;
- assistance to the handicapped/disadvantaged;
- the definition of the target population(s) vis à vis the locational variables of Service Bureaux offices;
- promoting the services of the Bureaux modules to the target population(s) through the media;
- rank ordering of client groups according to Task Force priorities;
- the need to clarify the interaction with Members of Parliament and constituency offices; and,
- criteria in the development of data bank resources, updating and central information available for this updating,

In summary, an interview contact suggested that the -- "...concept of the Service Bureaux program has changed from a narrow referral service to providing more service..."

. While the experimental design of the pilot project necessitates flexibility and the Task Force has attempted to address many of the broader issues above, field resources find that the absence of more definitive direction from and communication with the Task Force results in a policy vacuum with each Bureau formulating ad hoc approaches.



- . The feeling was expressed that the Canadian public generally is not aware of the assistance that the Service Bureau modules provide; is not certain of the meaning of a referral service; but those making enquiries were most appreciative of the Service rendered.
- . Based on the modest number of interviews conducted during the Evaluation Assessment, the majority of respondents indicated that advertising/promotion of the Service Bureau modules should be an integral element of the experimental approach adopted in the pilot project and should be given greater priority.

The points highlighted in this Section are by no means all embracing. The paucity of sound conclusive evidence, in the judgement of the study team, reinforces the need for further evaluation at this time, despite the relative newness of the Service Bureaux Program.

These observations, in conjunction with the program models, were used to identify and assess a short list of evaluation issues of potential significance to senior management. These are enumerated in the next section. The evaluation issues identified reflect an attempt to be comprehensive in scope while sensitive to the experimental nature of the pilot project and its formative development. In addition, the overriding evaluation concerns ensure that the pilot project's processes, mechanisms and framework will permit the answering of management's questions related to the operational assessment of the independent program initiatives.





## 5.0 EVALUATION ISSUES

### 5.1 Introduction

Within the current guidelines and approach to evaluation issues, as supported by the Office of the Comptroller General, four main issue areas are highlighted in this section:

- Program Rationale;
- Objectives Achievement;
- Impacts and Effects; and,
- Alternative Program Delivery.

The evaluation issues identified are presented in Exhibit 8 and cover all four evaluation areas of concern.

The issues presented in this section are grouped under three headings -- Design Issues, Service Level Issues, and Program/Related Dynamics Issues. The rationale for the issues and the expected results from their evaluation should be considered carefully before including or excluding them in the evaluation options. The evaluation methodologies to address various combinations of these issues are discussed in Section 6: Evaluation Options.

### 5.2 Design Issues

The principal objective of the Task Force Service Bureaux pilot project is "to determine the level of service, the cost effectiveness and market penetration levels required to meet the needs of Canadians." The Task Force designed the pilot project, therefore, to enable the operation of and assessment of alternative service approaches.



EXHIBIT 8: EVALUATION ISSUES RAISED ACCORDING TO OCG CRITERIA

<u>Evaluation Issue Raised</u>	CATEGORY			
	<u>A</u>	<u>B</u>	<u>C</u>	<u>D</u>
<u>Program Design Issues</u>				
1. To what extent have Service Bureaux Program criteria been developed, adhered to and with what current results for the future determination of operating modes and levels?	X	X		
2. To what extent has the Service Bureaux Program assisted in the determination of the market to be served and the actual levels of demand to be met?		X	X	
3. Has the development of data banks at local service levels contributed to the identification of the public needs for referral and/or access?		X		
4. Are the current interpretations and practices followed by the Service Bureaux Program adequate to assess the needs of Canadians?		X		
<u>Service Level Issues</u>				
5. Is there evidence that the Service Bureaux Program has resulted in incremental changes in the volume of enquiries and changes in client satisfaction that would indicate a continuing need for, or modification of Program services?	X			
6. Are the dynamics of the Service Bureaux initiatives supportive of clients' needs: - in walk-in offices; - in itinerant services; and - in carrells?		X		
7. To what extent has the provision of publications been a factor in providing improved services to the public?				X
8. Is the current limitation of the Service Bureaux Program role (e.g. referrals only vs. referrals and information/ in-person priority vs. in-person and telephone enquiry) providing a sufficient level of service at the testing/ experiment stage?		X	X	
9. Has the level of advertising had an impact on the Service Bureaux Program operations and to what effect?		X		X
<u>Program/Related Dynamics Issues</u>				
10. To what extent and to what effect have - Federal Departments and Agencies, - Provincial/Municipal jurisdictions, and - Federal Members of Parliament and their Constituency Offices played a role in the Pilot Project initiatives?		X		
11. How have internal management, training and communications affected the operation of, and the achievement of, the Service Bureaux Program projects, both regionally and in total?			X	
12. Is the level of and use of resourcing available and sufficient to achieve the stated objectives of the Program?			X	
13. Should a Program of providing access/referral to the public be manned and operated through Public Service staff or through continuing private contract arrangements and what are the dynamics, benefits, and drawbacks of each approach?		X		X
14. Do the office locations, layouts, image portrayal and staff dynamics in handling the public, have a bearing on the volume and types of public use and to what effect?		X		X
<div> <div>A Rationale</div> <div>B Objectives- Achievement</div> <div>C Impacts/Effects</div> <div>D Program Alternatives</div> </div>				





The Service Bureaux modules were to be designed, located and operated, not so much to provide a pre-determined level of service, but to experiment with a range of different services. The purpose in this approach was to determine appropriate mixes of locations, levels and types of services for future decisions to be made based on their findings. In order to achieve this objective, the design of the Program must -- of necessity -- be predicated upon clear criteria and carefully constructed recording and reporting mechanisms as the basis for the future assessment of the pilot project.

Several Canada Service Bureaux and Itinerant facilities were observed. Office locations were varied but a significant question to be evaluated is whether Program criteria are suitable for providing answers for determining the ultimate delivery model.

In the area of services provided, the interviews and field visits indicated a variety of service approaches. The value of each different type of approach should be the provision of comparative results. Whether the means to assess service approaches exists and to what extent it is meaningful would form a key part of a subsequent evaluation.

All Bureaux and Itinerant offices visited maintained records on the numbers and types of enquirers and their enquiries. No clear evidence was found on whether the information forwarded to the Task Force was used. The basic premise of operating the Service Bureaux Program is to utilize such findings and therefore the inclusion of this aspect of the Program in an evaluation is evident.



The issues to be resolved within the program design areas are:

Issue #1 *To what extent have Service Bureaux Program criteria been developed, adhered to and with what current results for the future determination of operating modes and levels?*

Because of the importance attached to the results of the Pilot Project in determining and shaping a continuing program of Service to the public, the foundation upon which judgements will be made is vital. Criteria, designed and applied vigorously are the only verifiable measures in answering such questions. It is therefore essential that the Task Force management obtain a clear indication as to the adequacy of existing criteria, their application; and, indications if new or modified criteria are required.

The issue is of special significance in view of the growth and development of a range of other information/service groups advising the Canadian public on access to the public sector. Should the criteria and structure of the Service Bureaux pilot project reflect these concerns? Should the criteria recognize the potential for greater liaison with the services of departments/agencies and other levels of government? Until the criteria and their impacts are analyzed and evaluated these types of questions cannot be answered with certainty.



Issue #2 *To what extent has the Service Bureaux Program assisted in the determination of the market to be served and the actual levels of demand to be met?*

Despite the previous experience of Information Canada and earlier Task Force research, the question of where the greatest needs exist and how to reach these publics remains largely unanswered. The use of Bureaux and Itinerant services in varying locations and modes was intended to assist in this market identification, definition and analysis. Early evaluation results should indicate the level of success possible through these initiatives.

Interviews with Task Force management repeatedly raised this issue as an area of importance. Is there a need for the services being provided? How do we know what kinds of information meet customer needs? Has the public an awareness of the Program? If so, at what level? Is the Pilot Project providing a meaningful test of the dynamics Cabinet wished tested? Evaluation of this issue would provide the basis for determination of these concerns with some certainty.

Issue #3 *Has the development of data banks at local service levels contributed to the identification of the public needs for referral and/or access?*

The premise of the Service Bureaux pilot project is the appreciation of and sensitivity to the Canadian public's need for access to the federal government. Consistent with the overall experimental design, the Task Force did not provide Regional Managers with a complete/comprehensive data bank. Rather, Regional Managers were familiarized with the basic building blocks of the national data bank -- including, the 1981 Index to Programs and Services -- and were encouraged to build local data banks about this superstructure.





Interviews with Task Force management and Regional personnel indicated a wide variety of approaches in the development of the local data banks were adopted. Field visits by the study team confirmed the diversity of approaches. Several personnel indicated that the strengths of this approach were evident in the sensitivity to local priorities, immediate information issues, increased staff involvement/morale and the high quality of referrals/ reported client satisfaction.

The issue identified here is of significance therefore to Task Force management and Regional personnel. Evaluation of this issue will have a direct bearing on the whole range of design variables integral to the concept of appreciation of an sensitivity to the public's need for improved access to government information and services.

Issue #4 *Are the current interpretations and practices followed by the Service Bureaux Program adequate to assess the needs of Canadians?*

Over the formative period since the introduction of the Service Bureaux pilot project, the Task Force has delineated the roles of the Bureaux in a number of discrete policy decisions or management interpretations. A sample of these are noted:

- to focus the service initiative on strict referrals to programs and services;
- to expand the referral function with the provision of basic information as warranted by the enquirer;
- to emphasize the in-person dimension of the Service Bureau modules;
- to 'discourage' the excessive use of the Bureaux modules for responding to telephone enquiries;
- to distinguish the in-person services of the Service Bureau pilot project from existing joint federal-provincial telephone enquiry services as well as other information and referral agencies in the community; and,



- to limit the profile of the Service Bureau modules by reducing advertising/promotion activities and the employing of nominal signage for identification purposes only.

The evaluation issue posed is whether this approach, if adequate in the past, should be continued or should a more formal, directive approach be adopted.

### 5.3 Service Level Issues

The major thrust of the Service Bureaux pilot project is to identify ways and means of shaping a Program to meet the public's needs. The effort to produce a viable level of service is also a significant part of the pilot project experiment. Only through the best service efforts at the Pilot Project stage, can improvements or need to change be assessed in a comprehensive manner.

The study team recognizes that it is therefore within the scope of the evaluation to examine issues of current effectiveness of operation.

A number of evaluation issues therefore emerge from the level of service area:

Issue #5 *Is there evidence that the Service Bureaux Program has resulted in incremental changes in the volume of enquiries and changes in client satisfaction that would indicate a continuing need for, or modification of Program services?*





The very nature of the Bureaux 'store front' locations will attract a clientele. More obviously the Itinerant services reach people where they work or reside in rural areas, saving the public transportation and communication costs. The issue, however, is whether these services have increased the number of public served or have they merely siphoned off a public who might otherwise have found the appropriate Department providing service. The incremental effect, in our opinion, is the true test.

Interviews with management emphasized the Task Force's awareness of this issue and their need for information:

- "Is there a need for the service provided"?
- "What is the best mix of services to be provided"?
- "How does client satisfaction rate"?
- "What are the dynamics of service..."?
- "What are the implications for improved delivery of the Program's Services"?

Issue #6 *Are the dynamics of the Service Bureaux initiatives supportive of clients' needs:*

- *in walk-in offices;*
- *in itinerant services; and*
- *in carrells?*

Despite a common, broad-based training session with most of the field staff, the study team observed many different reception/assistance techniques in use. In some cases the training-recommended techniques were challenged. As this area of public interface (which in Departments is so often criticized by the public) is critical to the Service Bureaux concept, we believe it to be a significant evaluation issue.

Evaluation of this issue would clearly isolate the activities and the products of the pilot project ensuring that the intended publics are in fact reached. The measuring of the effectiveness of supportive client dynamics would provide management



with a factual data base of use in refining existing activities and in the formulation of future program initiatives. A further benefit derived from the evaluation of this issue would be a determination of the extent to which the target publics of the pilot project are reached.

Issue #7 *To what extent has the provision of publications been a factor in providing improved services to the public?*

The pilot project initiatives have been designed to provide a spectrum of locations and activities so a means of providing information for the design and operation of a continuing access and referral service.

The availability and suitability of a range of government publications is one aspect of the function of an access/referral activity designed to inform and assist Canadians in obtaining service.

The way in which publications are presented; the type of public attracted by a publications display and the use to which publications are employed are all questions that should be an integral part of a formal evaluation.



Issue #8 *Is the current limitation of the Service Bureaux Program role (e.g. referrals only vs. referrals and information/in-person priority vs. in-person and telephone enquiry.) providing a sufficient level of service at the testing/experiment stage?*

There is an almost insatiable appetite for service and information yet, nobody ever says -- you have given me all the service I want. The Service Bureaux pilot project is a formative experimental design. It is intended to test a range of complex, integrated issues (e.g. locational variables, demand characteristics, advertising impacts...).

The focus of the evaluation issue addressed here centres on the efficacy of in-person referral services in producing appropriate levels of service over the duration of the pilot experience. The importance of this issue is to identify and to test the legitimacy of the over all pilot project initiatives in view of the real policy constraints/limits imposed on its operations. Key questions that the evaluation would examine include:

- Does the Service Bureaux pilot project in fact improve the access of citizens to government information sources?
- Do members of the general public experience reduced frustration in obtaining services and information through the Service Bureaux network?
- Is the image of the federal government as a provider of services across the land enhanced by the Service Bureaux pilot project?
- Does the new enquiry system provide useful assistance to Members of Parliament and their staffs in meeting the needs of their constituents?
- Is the image of the federal civil servant enhanced by the Service Bureaux pilot project?
- What are the implications for level of service as the program matures?
- What are the main service related problems experienced?





- How long will it take to resolve these service related problems?
- Are the pilot project's basic service priorities consistent with an appropriate level of service at the testing/experimental stage?

Findings in response to these questions would permit both the evaluators and Task Force management to make substantive statements on the efficacy of the specific range of pilot project services and the Service Bureaux concept.

Issue #9 *Has the level of advertising had an impact on the Service Bureaux Program operations and to what effect?*

An extended promotion/advertising campaign highlighting the purpose, role and availability of the Bureaux, Itinerants and Carrells is awaiting Ministerial approval. At this point, the pilot project service modules have had the benefit of only limited local signage and office opening promotion. Interviews with Regional personnel indicated this, in itself, created a problem as the first questions a potential client sought were -- "What is this? What do you do? What is a referral? Who is responsible for this?"

The effects of advertising/promotion of the Service Bureaux would be complex, interactive and time specific; the impacts due to the absence of a concerted promotion of the Service Bureau modules are equally complex. Evaluation of the impact of advertising on the pilot project would focus on specific client awareness and demand determinants, including:

- . availability of information explaining the program;
- . understanding of overall program objectives;
- . awareness of the location of the nearest Service Bureaux module;
- . speed and accuracy of response to enquiries;
- . role and participation of the federal departments in responding to complex questions requiring interpretive ability.



Evaluation of this issue would be essential in the determination of the importance of advertising and the service demand related impacts in an experimental program of this type.

#### 5.4 Program/Related Dynamics Issues

This section presents the study team's analysis of the various dynamics that could be expected to have significant impact on the operations of the Service Bureaux pilot project.

The resources and management areas of the Task Force, approaches to the training of staff, development of procedures/systems and general management of the Program were examined. The level of resourcing, in global terms was recorded and the views of field staff were obtained on the adequacy and timeliness of Headquarters response to their needs.

The Task Force has mounted the Service Bureaux Program within a pressure-creating time frame. Further, the broad issues of training, equipping and directing the staff have been met, albeit by a combination of planned and ad hoc decisions. The issues requiring examination from a Program Evaluation perspective relate more to the continuing, future operation of the Program.

Finally, the external dynamics of the pilot project vis à vis the Federal Departments and Agencies and Provincial/Municipal jurisdictions were considered. Under the terms of reference, however the study team was unable to explore these areas fully. Interviews conducted with Service Bureaux staff indicated a wide divergence of views and opinions. As the participation, attitudes and roles of these groups are crucial to the ultimate provision of service, the issues identified and included in this section are of particular significance.



The issues identified in the Program/Related Dynamics area are:

Issue #10 *To what extent and to what effect have*

- Federal Departments and Agencies,*
- Provincial/Municipal jurisdictions, and*
- Federal Members of Parliament and  
their Constituency Offices*

*played a role in the Pilot Project initiatives?*

The Service Bureaux pilot project interacts directly or indirectly with virtually every federal department in providing access to information and expert referral services to the public. Interviews with Task Force members and regional visits confirmed the importance of this dynamic. Indeed, the training and operating guidelines of the Service Bureaux recognize the departments' position as an integral element in responding to public enquiries.

Questions of fact requiring no interpretation or value judgement are responded to by the service personnel. More complex questions are carefully screened; the Client Service Officer probes to determine the real question and then telephones the appropriate government department/agency and stays on the line until the right contact is reached. The client is connected with the departmental expert and the enquiry is resolved.

Interviews with field personnel suggested that while the response to the Service Bureaux was "positive" overall, some Client Service Officers perceived a "reluctance" and "a lack of commitment" on the part of some departments and information officers.





The referral role of the Service Bureaux is clear; it remains however, that the Bureaux operate in a sensitive environment. Evaluation of this issue is of importance and the findings would be of significant benefit in clarifying the linkages and relationships between the departments/agencies, Members of Parliament, Constituency Offices, and the Canada Service Bureau modules should the project become a continuing federal service initiative.

Issue #11 *How have internal management, training and communications affected the operation of and achievements of the Service Bureaux Program projects, both regionally and in total?*

Addressing this issue in the evaluation would provide the Task Force with an appraisal of the operating and organizational relationships and their impact on the achievements of the pilot project. For example, the majority of field personnel perceived a real need to communicate more frequently and more openly with Task Force management. Several suggestions were recorded including:

- regular meetings of the Regional Managers with Management;
- periodic meetings of Regional Managers/Satellite Bureau Managers from distinct geographic zones;
- periodic regional seminars of client service officers; and,
- more frequent training and briefing sessions.

In exploring this issue, evaluators would assess whether the internal management, training and communications of the Task Force have been delivered efficiently and to what extent the present arrangements have impacted on the effectiveness of the Service Bureaux pilot project. The examination of this issue would also include an examination of possible alternative approaches where significant evidence indicated a need for change.



Issue #12 *Is the level of and use of resourcing available and sufficient to achieve the stated objectives of the program?*

Discussions with the Task Force management and regional personnel suggested that the level of resourcing available to the project was in itself a major area of concern. In addition, the reporting of and accountability for resource expenditures were also referenced.

In addressing this issue, evaluators would identify and document the actual internal and external resources made available to the pilot project. The evaluators would then determine whether the order of magnitude of these initiatives was plausibly sufficient to achieve the stated objectives of the Service Bureaux pilot project. By comparing the resources available to this experimental initiative with those of other projects/programs with similar intended impacts, a qualitative assessment could be made of the program utilization and focus of resources. Questions such as the possible effects of increasing e.g. scaling-up or decreasing Bureaux funding should be tested through sensitivity analysis techniques.

Issue #13 *Should a Program of providing access/referral to the public be manned and operated through Public Service staff or through continuing private contract arrangements and what are the dynamics, benefits and drawbacks of each approach?*

The essence of the issue identified here is related to the potential of the pilot experiment to become a continuing program initiative. With one exception, each of the Service Bureaux and Itinerant offices is staffed by private sector contract personnel. The use of contract personnel during this experimental phase permitted Task Force management to move more quickly in mounting a credible enquiry and referral service.



Should the pilot project become a continuing federal service initiative, staff of the Service Bureau modules will be drawn from the public service. The questions to be considered under this evaluation issue centre first, on the dynamics of the continuing program and second, on the implications in mobilizing an effective public service staff of up to 300 personnel. Are there particular impacts on the service dynamics of the Bureaux, or particular costs/benefits evident at this time? Would management's activities in the administration of the Service Bureaux change e.g. staff relations, personnel administration?

Evaluation of this issue is therefore of significant value in providing management with additional insight on the dynamics and viability of a continuing Service Bureaux program. Evaluation results, based on an examination of the issue, would complement the pilot project's testing of the range of other Service related dynamics and respond to the questions highlighted by Task Force management and regional personnel in interviews with the study team.

Issue #14    *Do the office locations, layouts, image portrayal and staff dynamics in handling the public, have a bearing on the volume and types of public use and to what effect?*

The dynamics of this issue are an integral element of the Task Force Service Bureaux pilot program. The information obtained in the evaluation of this issue would address management's need for information on the adequacy of the design/enquiry demand determinants, the linkages to enquiry volumes and types of enquiries and could provide insight into alternative means of encouraging improved program/related client service dynamics.





The thrust of the pilot project is to test a number of service related dynamics. The variety of Service Bureaux locations and Itinerant Service areas are an integral part of this design. Regional visits by the study team confirmed the range of sites selected and the varying impact of each in terms of their design, projected image and service area.

Evaluation of this issue would provide management with important insights in examining the impacts and dynamics issues of the pilot project experiment.

#### 5.5 Evaluation Issues Summary

Below is a summary of evaluation issues. The program design issues are:

- |                 |   |
|-----------------|---|
| <u>Issue #1</u> | To what extent have Service Bureaux Program criteria been developed, adhered to and with what current results for the future determination of operating modes and levels? |
| <u>Issue #2</u> | To what extent has the Service Bureaux Program assisted in the determination of the market to be served and the actual levels of demand to be met?                        |
| <u>Issue #3</u> | Has the development of data banks at local service levels contributed to the identification of the public needs for referral and/or access?                               |
| <u>Issue #4</u> | Are the current interpretations and practices followed by the Service Bureaux Program adequate to assess the needs of Canadians?  |



The Service level issues are:

Issue #5 Is there evidence that the Service Bureaux Program has resulted in incremental changes in the volume of enquiries and changes in client satisfaction that would indicate a continuing need for, or modification of Program services?

Issue #6 Are the dynamics of the Service Bureaux initiatives supportive of clients' needs:

- in walk-in offices;
- in itinerant services; and
- in carrells?

Issue #7 To what extent has the provision of publications been a factor in providing improved services to the public?

Issue #8 Is the current limitation of the Service Bureaux Program role (e.g. referrals only vs. referrals and information/in-person priority vs. in-person and telephone enquiry.) providing a sufficient level of service at the testing/experiment stage?

Issue #9 Has the level of advertising had an impact on the Service Bureaux Program operations and to what effect?

The issues within the program dynamics area are:

Issue #10 To what extent and to what effect have

- Federal Departments and Agencies,
- Provincial/Municipal jurisdictions, and
- Federal Members of Parliament and their Constituency Offices

played a role in the Pilot Project initiatives?



Issue #11 How have internal management, training and communications affected the operation of, and the achievements of, the Service Bureaux Program projects, both regionally and in total?

Issue #12 Is the level of and use of resourcing available and sufficient to achieve the stated objectives of the Program?

Issue #13 Should a program of providing access/referral to the public be manned and operated through Public Service staff or through continuing private contract arrangements and what are the dynamics, benefits, and drawbacks of each approach?

Issue #14 Do the office locations, layouts, image portrayal and staff dynamics in handling the public, have a bearing on the volume and types of public use and to what effect?

The wide range of issues covered, as indicated earlier, have significance for the types of evaluation that could be considered by Task Force management.





## 6.0 EVALUATION OPTIONS

### 6.1 Rationale for Evaluation Options

The study team has developed five (5) evaluation options which address the range of issues identified during the Evaluation Assessment. An effort has been made to select options that, in examining the dynamics and processes of the pilot project, will provide management with increasing insight into the critical components of the Service Bureaux experience. A significant factor in developing the framework for these various options was the formative stage of the Service Bureaux pilot project at this time.

The five (5) basic evaluation options presented in this section are:

An Ex-Post Evaluation Option: which would measure efficiency and effectiveness to date and relate the findings to the potential of the Service Bureau Program to achieve stated objectives, including assessments of the effects of increasing or decreasing program resource levels.

An Effectiveness Monitoring Option: wherein a determination would be made of the extent to which established objectives and desired impacts were achieved.

A Management Monitoring Option: in which the design, process, criteria and data structures and the management directives and actions would be evaluated to determine the degree to which they contributed to program achievement.

A Formative Evaluation Option: involving intensive evaluation of all aspects of the Program to determine the revisions needed to ensure the relevancy of objectives and processes, the efficient use of resources and designs for alternative means of program delivery.



An Evaluation for an Experimental Project: in which the focus of the evaluation would be the more immediate operational needs of management in resource planning, internal processes/ data management and administrative improvements and the important area of assessment criteria for the ultimate analysis of and decisions on the design and operating modes for a continuing program of referral and access to Federal Government services. The rationale for the establishment of the experimental project would not be tested.

A cost breakdown for each option is provided in each of the following descriptions of the options. The total costs identified include consulting fees, survey and other expenses.

## 6.2 An Ex-Post Evaluation Option

### 6.2.1 Scope

The scope of the Ex-Post Evaluation Option is to examine the relevancy of the program's objectives, causal links and processes and to measure the efficiency and effectiveness of the program's processes and actions.

### 6.2.2 Purpose

The purpose is to determine;

- the plausibility of the linkage of objectives to activities and effects;
- the intended and unintended impacts of the program;
- the levels of efficiency and effectiveness achieved;
- the degree of duplication, overlap or conflict with other programs;
- the effect of discontinuing, increasing or decreasing the resource levels; and
- the possible strengths or weaknesses within the Program.

The findings of the Evaluation would provide management of the Task Force with an understanding of the critical Program linkages and the performance of key components of the Pilot Program. This information would contribute to the determination of appropriate future thrusts and levels of activity for the Program.



### 6.2.3 Methodology

The methodology, in capsule form would involve:

- an internal detailing of data resources, processes, criteria, performance indicators, resourcing and an assessment of each of the above elements;
- an extensive survey of client areas to determine client satisfaction levels;
- an intensive series of interviews with all interacting programs and services; and
- detailed cost-effective analysis of alternative levels of resourcing.

### 6.2.4 Estimated Duration and Study Level

The study would involve 4 - 5 months of detailed, concentrated work, involving a minimum of three consultants and several survey/questionnaire approaches. The estimated cost would be in the 50/60 thousand dollar range.

## 6.3. An Effectiveness Monitoring Option

### 6.3.1 Scope

The scope of Effectiveness monitoring Evaluation would be to determine to what extent were the established objectives of the Program and the desired impacts achieved.

### 6.3.2 Purpose

The purpose of Effectiveness monitoring is to test the:

- effectiveness measurement data from Program and users;
- objectives criteria;
- cost indicators; and
- other possible impact results.

The findings would be used to present the current achievement levels of the program and their applicability for the future activities of the program.





### 6.3.3 Methodology

The methodology would involve:

- detailing the program measures of effectiveness and their relation to the objective and desired impacts;
- testing through review of existing data and survey users, the validity of performance data;
- assessing the relative cost effectiveness of the results obtained by cost/benefit analysis; and
- conducting analysis of the proven results against program criteria.

### 6.3.4 Estimated Duration and Study Level

The monitoring of effectiveness would involve 2 to 5 months of two consultants and limited survey work. The estimated cost would be in the 25/30 thousand dollar range.

## 6.4 A Management Monitoring Option

### 6.4.1 Scope

The scope of this Evaluation Option is narrower and primarily targeted at the efficiency areas of the program, but with an examination of the management policies and practices as they relate to program effectiveness included.

### 6.4.2 Purpose

The purpose is to determine within the accepted objectives, causal links and existing processes:

- the degree to which resources and program processes were utilized within planned levels of activity; and
- the extent to which management control and direction affected the achievement of results.

Such an option would provide valuable information to management and evidence/direction for improving the pilot program's effectiveness. The evaluation approach adopted would be significantly more quantitative than the methodologies described in the previous options.



#### 6.4.3 Methodology

The data requirements of this evaluation option are more extensive and the analysis required more rigorous than was possible during the Evaluation Assessment. The methodology would encompass:

- systems design analysis;
- measurement data usage analysis;
- control mechanism assessment;
- interviews of staff at all levels;
- detailed analysis of budgets, costs and utilization; and
- an analytical comparative review of Program plans and performance results.

#### 6.4.4 Estimated Duration and Study Level

The study of Program Management would involve 2 to 3 months of work, involving two consultants, travelling to regional service bureaux offices for interviews and file/records search and analysis. The estimated cost would be in the 25/30 thousand dollar range.

### 6.5 A Formative Evaluation Option

#### 6.5.1 Scope

Formative evaluation is an intensive evaluation option involving all aspects of the Pilot Program. Alternative models for program delivery are stressed including the reframing of objectives, criteria, processes, data base and activities as deemed necessary to ensure the continuing relevancy of objectives and processes.

#### 6.5.2 Purpose

The purpose of formative evaluation is to determine the revisions needed to the program's objectives, causal linkages and processes to ensure their relevancy, the efficient use of resources and to ensure the impacts and effects meet desired levels.



### 6.5.3 Methodology

The methodology, in brief, would involve:

- extensive research of Task Force files, documents and decisions to analyse the rationale and the linkages of the program;
- an intensive detailing of processes, criteria, data sources, performance indicators, resourcing and assessment of these elements;
- an intensive survey of users, interacting agencies and departments to determine effectiveness of the program;
- examination and analysis of other similar programs in Canada and elsewhere to determine potential alternative program delivery designs; and
- detailed modelling and cost implication analysis to determine the effects of various design/delivery proposals.

### 6.5.4 Estimated Duration and Study Level

The study, by its intensive nature would take 5/6 months and would involve both consultants and technical design experts and extensive survey/interview time and coverage. The estimated costs would be in the 60/80 thousand dollar range.

## 6.6 An Evaluation for Experimental Projects

### 6.6.1 Scope

The evaluation framework proposed for this experimental project would emphasize criteria used to establish the various alternative approaches and the means of capturing and analyzing data from each approach to ensure that Task Force Management is equipped to advise the Government on the optimum approaches for providing access to Federal Services. The immediate management and process issues in administering these operations would also be evaluated. Elements of management's practices and meeting of objectives would be reflected in examining the challenge of and the response to bureaucratic processes - a function normally reported through management audit studies - to determine the effects on overall Service Bureaux achievement of objectives.





### 6.6.2 Purpose

The purpose of this evaluation framework approach is to provide management with critical feedback on the key processes/activities and linkages within the experimental project design. The thorough and consistent basis for defining and refining the pilot study over time provides direction to the present and future management of the Service Bureaux experiment.

### 6.6.3 Methodology

The evaluation methodology of this experimental project would encompass:

- extensive research of Task Force files, documents and decisions to examine the immediate operational issues e.g. the suitability of bureaux design and location; the effect of signage and projected Service Bureaux image.
- an intensive detailing of processes, criteria, data sources, performance indicators, resourcing and assessment of these elements;
- interviews with staff at all levels e.g. staff approaches to the various publics; contract versus public service staff, immediate organizational issues.
- analysis of budgets, costs, utilization and the availability of comparative data e.g. the objectives achievement and impacts and effects evaluation issues.
- Survey of users, interacting agencies and departments e.g. efficiency and effectiveness of the experimental design.
- detailed comparative analysis of each of the variety of approaches adopted by the Service Bureaux project.
- detailed modelling and cost implication analysis to determine the effects of various design/delivery limitations for a future continuing program.
- testing the current capacity for analysis of the variety of approaches and assisting in the design of the analysis framework if required.
- examination and analysis of other similar programs in Canada and elsewhere to test the approach and design elements used by the Task Force.



#### 6.6.4 Estimated Duration and Study Level

The focus of the evaluation on the operation issues of the experimental program design would be 3/4 months duration including survey and intensive time. The estimated costs would be in the 30/35 thousand dollar range.

#### 6.7 Criteria for Assessing Options

In order to objectively compare the evaluation options and assist management in selecting a preferred alternative criteria are proposed consisting of:

1. The need to know. Cabinet and Task Force management require a 'prototype' evaluation to provide interim answers to ensure that the existing Service Bureaux Pilot Project design is 'on-track' and will provide appropriate answers to the service and dynamics issues of enquiry agencies.
2. Highlighting of the key expected results which would emerge from the evaluation.
3. Required historical data base in the conduct of the evaluation.
4. The expected calendar time required to complete the evaluation.
5. The expected level of effort required to conduct the evaluation.

Exhibit 9 provides a summary of evaluation options by the assessment criteria permitting management decision on the most appropriate option for their needs.

The level of effort required to conduct each evaluation option was estimated assuming a study team comprised entirely of consultants. Should Task Force/Departmental staff participate, the indicated levels of effort may be subject to revision.



# EXHIBIT 9: SUMMARY OF EVALUATION OPTIONS BY ASSESSMENT CRITERIA

EVALUATION OPTIONS	DEGREE TO WHICH RESULTS OF CONCERN TO:		EXPECTED RESULTS	CALENDAR TIME REQUIRED TO COMPLETE (MONTHS)	LEVEL OF EFFORT EXPENDITURES	
	MINISTER	TASK FORCE			DAYS	(\$ 000)
1. Ex-Post Evaluation	High	High	-Efficiency and Effectiveness to date -Objectives achievement -Impact of changing resource levels	4-5	110	\$50 - 60
2. Effectiveness Monitoring	Medium	Low	-Established objectives & desired impacts achieved	2-5	50	\$25 - 30
3. Management Monitoring	Low	Medium	-Evaluate design, process, criteria, data structures, & management directives -Contributions to program achievement	2-3	55	\$25 - 30
4. Formative Evaluation	Medium	Medium	-Intensive evaluation -Relevancy of objectives and processes -Efficient use of resources -Alternative designs for delivery	5-6	60	\$60 - 80
5. Evaluation of an Experimental Project	High	High	-Immediate operational needs of management -Resource planning, processes, data management -Administrative improvements	3-4	70	\$30 - 35





## 6.8 Recommended Evaluation Option

The Ex-Post and Formative methodologies offer intensive evaluation options. While perfectly valid even at this early stage in the experimental project's existence, there are important disadvantages associated with these approaches that outweigh the obvious advantages of seriously examining the pilot project and re-orienting it as early as possible. The major and overriding disadvantage is the lack of sufficient performance data and historical context to either support or refute systems change at this time. If however, management were to consider deferral of the evaluation for any period exceeding one year, then either of the options should be considered. Further, the selection of an evaluation option to meet urgent reporting time constraints now would not preclude the conduct of either of these evaluation options at some later date.

The Effectiveness and Management Monitoring options have the distinct advantages of providing management with essential feedback from aspects of the pilot project experience on which the decisions concerning future funding and activity levels may be based. The disadvantages of these approaches are their reliance on the availability and reliability of data as well as, the degree of difficulty presented due to the relatively brief life span of the Service Bureaux pilot project.

The study team recommends that the option entitled Evaluation of an Experimental Project be used in an evaluation of the pilot project experience at this time. The advantage of this evaluation framework is the option's greater sensitivity/responsiveness to the more immediate needs of management in the areas of resource planning, internal operations processes and managerial improvements. As well, the option seems better suited to an experimental project design that:

- has recently been introduced;
- has a varied range of approaches;
- is designed to provide answers, but also provide service; and
- is flexible and adaptable to changing pilot project design.



Despite this recommendation and the study team's presentation of evaluation options, the Task Force has the ultimate responsibility for selecting and/or redefining the proposed evaluation options.

#### 6.9 Evaluation Study Terms of Reference

(Based on the assumption that the Task Force Management selected the Experimental Project Evaluation)

The Experimental Evaluation Study Team should:

- focus on the design of the Program in terms of its ability to provide a representative variety of service alternatives;
- assess the criteria used to ensure that design elements were adopted for each mode and variety of services;
- determine the particulars of the data base, its sources and the uses to which it is utilized;
- examine all supporting dynamics to the Program, such accommodation, location and design, training, equipment, staff relations, etc., to determine their degree of supportiveness to the Program;
- determine, through sampling, the level of effectiveness of the experimental services, as an aid to assisting Task Force management in determining ultimate service levels;
- determine, through sampling, the source of, and reason for, the clientele, as an aid to market penetration determination; and,
- gauge the degree of support or concern existing within Departments, MP consistency offices and other affected areas, on the efforts of the Task Force.



APPENDIX A

SERVICE MODULES

AND

DESCRIPTION





## BACKGROUND

This appendix presents a brief overview of the components of the Service Bureaux pilot project.

### DSS Task Force on Service to the Public (1978)

The current Task Force on Service to the Public was formed to work with all departments in raising the quality of government service, to improve communications between the citizen and the public service and to make it easier for people to deal with the government. The three target areas identified by the Task Force for action are therefore Service Delivery, Awareness and Access.

The Task Force's Service Delivery and Awareness work is in its formative stages but, the object is to ensure that public servants do a more effective, meaningful and satisfying job. The employee responsible to the public will no longer be limited to the person across the desk or working on the switchboard. Task Force activities are directed to ensuring that all public servants will be involved in and accountable for serving the public and are equipped to help, to explain or listen to the public by phone, in person or by letter.

### Access to Government Services and Information

Since its creation, the Task Force has focused considerable attention on attacking the problems that Canadians have in accessing and obtaining Federal services and information. This attack was launched on three fronts: --

- . Access by telephone
- . Access through in person visits; and,
- . Access through Members of Parliament.



The Service Bureaux pilot project is directed to improving the public's access to federal programs and services through the experimental examination of in-person enquiry facilities. The objectives of this approach are:

- . To determine the level of service, the cost effectiveness and market penetration levels required to meet the needs of Canadians; and
- . To find ways and means of attacking the problem and to develop an approach to solving it.

(Cabinet Document,  
July 1980)

#### Access Through In-Person Visits

The Treasury Board Task Force study in 1977 into citizens' perceptions of government indicated that there was an apparent widespread dissatisfaction with the quality of federal services. The study also suggested that many respondents preferred to deal with government on a face-to-face basis. Even in government, personal contact is sometimes better than the telephone when discussing the completion of forms, looking up pamphlets or discussing correspondence which may be causing problems. The majority of those who preferred personal contact in the TB Study group were younger Canadians and those who lived in smaller cities and rural areas.

The federal presence in small communities is virtually non-existent. In small cities it exists however, but is fragmented in such a way that a citizen can easily become extremely frustrated in finding the "right" place to deal with an enquiry. The problem is further compounded as Canadians are ill-informed about jurisdictional responsibilities, either by department or by level of government. Even in major centres, where there are federal buildings and activities, the problem of serving the needs of the public still exists.



## The Service Bureaux Pilot Project

Studies and surveys have continued to demonstrate that the public is concerned in its dealings with the large and complex federal organization. Despite the enormous number of enquiries received by the government every day, no co-ordinated or consistent system existed to handle this traffic. The introduction of the Service Bureaux program is an attempt at improving the Federal Government's enquiry contacts with the public. The Service Bureaux Pilot Project is comprised of four modules:

### Service Bureaux/Satellite Bureaux

Bureaux are street level facilities located in a variety of high-traffic locations (e.g. existing government buildings, commercial/financial districts, heritage buildings, shopping centres and along major thoroughfares); they are situated and designed so as to encourage the public to enter, browse, sit and read; equipment and resource materials include the telephone, reference books, government publications, directories, indexes, pamphlets...; the public uses the services provided by the Bureaux to gain basic information or obtain a referral to a government agency.

### Itinerant Officers

Itinerant officers are part of a mobile enquiry service that covers smaller urban communities and portions of the rural areas of Canada. Working out of a base office and reporting to a walk-in service bureaux, the Itinerant Officers travel a regular route on a pre-arranged timetable carrying necessary reference material and using local telephones as backup. The services provided by the Itinerant Officers are basically identical to those provided by the Service Bureaux/Satellite Bureaux.<sup>1</sup>

---

1. The Task Force is currently examining the potential of equipping the Itinerant officers with portable Telidon capabilities.



For the purpose of the pilot program, 8 mobile offices are based in Kelowna, Gimli, North Bay, Sherbrooke, Matane, Bathurst, Sydney and Windsor (Newfoundland).

#### Information Carrells

Carrells are unmanned free-standing units designed to present reference materials on federal programs and services and in 30 proposed locations, a Telidon video display screen. The carrells will be placed in prominent sites (e.g. shopping malls, Post Offices, Cultural Centres, Employment Centres...) where the public will be able to use these units by interacting with the Telidon system or by examining the reference literature displayed.

The carrells are maintained and serviced independently by the nearest Service Bureaux or under separate agreements with sponsoring groups.

An additional sixty (60) non-Telidon information carrells are planned for implementation in the 1982/83 fiscal year.





## APPENDIX B

### STUDY WORK PLAN



Project # 13.125

Revised August 19

WORK PLAN SCHEDULE

1. Confirmation of Work Plan, -  
Management Review August 19
2. Conduct Key Interviews August 20 - 24
3. Develop Program Profile August 24 - 28
4. Develop Context Model August 24 - 28
5. Develop Assessment Strategy August 28 - Sept 1
6. Present 3, 4 and 5 for  
Management Review September 2
7. Conduct Assessment Interviews September 2 - 11
8. Assess Program Structures  
and Context Model September 8 - 11
9. Identify Evaluation Issues September 8 - 11
10. Present Revised Models and  
Evaluation Issues for  
Management Review September 14
11. Develop Evaluation Options September 14 - 16
12. Develop Evaluation Options'  
Criteria and Costing September 14 - 16
13. Draft Assessment Report -  
Management Review (Selection  
of Option) September 17
14. Develop terms of reference for  
full evaluation and draft final  
report September 18 - 21



15. Presentation of Final Report

September 21





APPENDIX C

MINUTES OF STEERING  
COMMITTEE MEETING



13:125

19 August 8.

Minutes of First Meeting

Services to Public Steering Committee

In attendance: A Sackmann - Task Force  
P McDougall - Task Force  
A Robert - Task Force  
G Maffini - DPA  
R Smith - DPA  
D Nelson - DPA  
R Burkart - DPA

The agenda was tabled and the Work Plan draft reviewed.

It was agreed that:

- DPA would review the Work Plan schedule to determine if the time frames could be tightened by at least one week. (NOTE - this was done and a Work Plan covering August 20th to September 21, provided to T.F. on August 21.)

Mr. Maffini stressed that the Evaluation Assessment would identify what could be evaluated. Robert asked if both a short term view and a longer term view could be taken with an evaluation framework and criteria developed - Agreed.

Mr. Smith raised issue of the need for interview lists - both first round key interviews and second round names. Also Mr. Maffini asked about a DM Interview. It was agreed that:

- Mr. McDougall would meet DPA - 20 August - 10 A.M. to develop lists
- Mr. Sackmann would check on DM interview (NOTE - Lists prepared with McDougall - DM not available for interviews).



Mr. Maffini raised OCG representative participation - Mr. Sackmann agreed to check. (Note - OCG Representative will participate to be named).

Mr. Robert proposed that Task 12, Development of Options should be done in conjunction with Task Force members - Agreed.

On the question of attempting to assess and ultimately evaluate such new (and in some cases, not yet implemented) initiatives, it was agreed that, notwithstanding the problems, the study team would attempt to assess potential and concentrate on future evaluation criteria and framework,

Mr. Sackmann raised several points relevant to the focus of the assessment study:

- the physical design location and impact of Bureaux needs to be assessed;
- the emphasis on Telidon in DPA proposal should be downplayed in the study;
- the awareness of the various publics of the Bureaux initiatives should be examined.

It was agreed that these points would be noted and Mr. Maffini stated that an on-site poll technique would be used at Bureaux locations to test public reaction.

The next Steering Committee Meeting is scheduled for September 2.



22 September 1981

MINUTES OF THIRD MEETING  
SERVICE TO THE PUBLIC STEERING COMMITTEE

In attendance: R. August - Task Force  
A. Sackmann - Task Force  
P. Macdougall - Task Force  
P. Trudel - Task Force  
J. Batchelor - Comptroller General  
G. Maffini - DPA  
B. Smith - DPA  
D. Nelson - DPA

The purpose of the meeting was to review the Evaluation Issues and Options identified. It was agreed that the Evaluation Issues expressed in the Interim report covered the range of concerns of significance in evaluating the Service Bureaux Pilot Program.

Four evaluation approaches were presented to the Task Force for consideration. Discussion focussed on the possible distinctions between program and project evaluation. It was decided that a fifth option embracing the unique experimental role of the pilot project would be developed (Evaluation of an Experimental Project). Further, it was decided that the methodology of this fifth option would emphasize the probing of issues to ensure that the experimental program was on track and secondly, that the benefits of the program are evident and related to overall goal/target achievement.

It was agreed that evaluation of the Service Bureaux pilot program at this time would not preclude a more extensive evaluation of the Service Bureaux concept at a later date. Indeed, it was agreed that the staged evaluation approach would be very beneficial.





The next Steering Committee meeting is scheduled for 29 September to review the draft final report on the Evaluation Assessment of the Service Bureaux pilot program.



APPENDIX D

INTERVIEW CONTACTS AND  
GENERAL FORMAT OF  
INTERVIEW GUIDE QUESTIONS



## INTERVIEW CONTACTS DURING THE EVALUATION ASSESSMENT

The following interviews were conducted with Task Force and Departmental personnel during the Evaluation Assessment of the Service Bureaux pilot project:

### Task Force

R. August  
A. Sackmann  
P. MacDougall  
P. Trudel

### Departmental

R. Davis  
(DSS, Personnel)

## REGIONS

### Winnipeg

G. Hall  
C. Duges  
S. Forbes  
C. Scerbo

### Quebec City

J. Babin  
L. Garant  
H. Maheux

### Interlake, Manitoba

F. Rankin  
W. Dalman

### Edmonton

D. Savaria  
B. Cameron

### Montreal

L. Boisvert  
L. LaRiviere  
N. de Lorme  
J. Lacoste

### Sherbrooke, Quebec

G. Roy





## INTERVIEW GUIDE QUESTIONS

### A. Roles/Responsibilities

1. Name, position, title?
2. Describe role, duties, responsibilities?
3. What contacts do you have with the Task Force? Reporting/ Accountability links to the TF? Who is the most frequent contact?
4. How do you perceive your role vis a vis the in-person devices offered in the pilot program?
5. Duties - % distribution of time?  
E.g. %

<u>Mgr</u>	<u>CSO</u>	<u>Clerical</u>
Mgmt 30	Maintenance 20	Admin. 60
Liaison 30	Referrals 60	Stats. 30
Referrals 20	Expt 20	Relief 10
Liaison other 20		

### B. Current Status of Program

1. What is your understanding of the overall plan of action for the pilot program?
2. What is your understanding of the intent of each of the components?
3. Interface/relationship?
  - a) DSS
  - b) Dept's - reaction to date
  - c) Media/Local service agencies
  - d) other levels of government (provincial/municipal)
  - e) MP's and constituency offices
  - f) Consulting firm
4. Is information relating to budgets, cost of implementation... available? How is the budget handled? Invoices?
5. Are you aware of performance measures to monitor volumes, satisfaction levels, efficiency? Describe.
6. Effects of relays in implementation, delivery of equipment, staffing...?

### C. Expectations/Products

1. Understanding of a) objectives, and  
b) products  
of the program?
2. Awareness of effects or impacts either intended or unintended to date?
3. Relationship of in-person visit pilot project to other TF initiatives (e.g. telephone access, blue pages...)

### D. Evaluation Issues

1. Views on key evaluation issues? Rationale?
2. Views on means of determining relevancy & evaluation of issues?
3. Persons or organizations that are directly related to the issue identified?



#### E. Service Bureaux/Itinerants

1. Operation & date? Official opening & date?
2. Number of personnel, full time/part time?
3. General nature of requests for information?
4. Are records maintained of volumes? Are monthly enquiry figures available?
5. Typical enquiry response process? Follow-up?
6. Profile of a typical client?
7. Profile of a repeat user?
8. Perceived level of client satisfaction?
9. How is data bank structured? Adequacy of data banks e.g. breadth of info, structure?
10. How would you rank public awareness of your service/ of the program?
11. Ideal personnel characteristics of SB staff?
12. Adequacy of Service Bureaux as to design and location? e.g. potential for displays, pick-up after hours? Are you familiar with the criteria on Service Bureaux placement?
13. Possible improvements to the system?

Is the rotation of staff from the Service Bureaux to the Itinerant Service useful? Explain!

#### All interviews

- provide a summary of issues and effectiveness to date.



APPENDIX E

LIST OF SOURCE DOCUMENTS  
REVIEWED



## LIST OF SOURCE DOCUMENTS REVIEWED

### Reports, Studies and Correspondence

The following source documents were reviewed in the course of the Evaluation Assessment:

1. Cabinet Discussion Paper Task Force on Service to the Public July, 1980.
2. Cabinet Discussion Paper Service to the Public January 24, 1978.
3. Miscellaneous Cabinet Document Working Papers.
4. Research Report: Task Force on Service to the Public (Treasury Board) March, 1978.
5. General correspondence and briefing notes to the Minister, Supply and Services Canada re: Task Force Status (1980, 1981).
6. Minister's Main Estimates Briefing Book, 1980-81.
7. Record of decision. Cabinet Committee on Communications (25 February, 1981).
8. Speeches by the Minister on opening of miscellaneous Service Bureaux (1981).
9. Miscellaneous Service Bureaux promotional and official opening kits.
10. Task Force on Service to the Public reference manual. Principles of Service, The Basic Service Model, The Service Improvement Model (February 1981).
11. Reference Manual for the Client Service Officer (April 1981).
12. Miscellaneous contract data for consultants, supplies and services in establishing the Service Bureaux pilot program.





- 13.. Mandate and minutes from meetings of the Advisory Board to the Task Force on Service to the Public.
14. Parliamentary Returns on Service to the Public issues, i.e., the location of Federal Service Bureaux.
15. Miscellaneous Task Force correspondence re: exhibitions/displays, Members of Parliament.
16. Report by J. Pell. Service to the Public, A Pilot Program for Mobile Service (January 31, 1981).
17. Report on Canada Service Bureau. Winnipeg, Manitoba. July 1981.
18. Miscellaneous status and activity reports from the Canada Service Bureaux.
19. Rapport sur les bureaux itinerants. Gilles Roy le 8 septembre, 1981.
20. Guide on the Program Evaluation Function Office of the Comptroller General of Canada, May 1981.
21. Program Evaluation: An Introduction. Office of the Comptroller General of Canada, Draft December 1980.
22. A guide on the Program Evaluation Function in Federal Departments and Agencies. Office of the Comptroller General of Canada, Draft November 1980.
23. Principles for the Evaluation of Programs by Federal Departments and Agencies. Office of the Comptroller General of Canada, Draft December 1980.

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Note: Detailed financial data on the status of the Service Bureaux pilot program was not available to the Study Team.



APPENDIX F

INTERIM REPORT ON  
EVALUATION ISSUES AND OPTIONS  
SERVICE BUREAUX PROGRAM



INTERIM REPORT ON  
EVALUATION ISSUES AND OPTIONS  
SERVICE BUREAUX PROGRAM  
TASK FORCE ON SERVICE TO THE PUBLIC

18 September 1981.

DPA Consulting Ltd.





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## 1. INTRODUCTION

### 1.1 Purpose

The purpose of this report is twofold:

- a) To present the evaluation issues and evaluation options resulting from the findings of the evaluation assessment study; and
- b) To present, for discussion and decision, an alternative approach to determining the effectiveness of the Service Bureaux Program, based on a Project Evaluation approach rather than Program Evaluation.

### 1.2 The Problem

Program Evaluation, as described within the guidelines of the Office of the Comptroller General, is aimed primarily at evaluating on-going programs where an historical background of data is available and where the rationale for the program and its approach needs to be evaluated.

The Service Bureaux Program was established, as a pilot project only, to assist the Task Force to meet the Cabinet requirement "to determine the level of service, the cost effectiveness and market penetration levels required to meet the needs of Canadians".<sup>1</sup>

In this context, as a pilot project, the Service Bureaux Program was developed to find ways and means of "attacking the problem and to develop an approach for solving it"<sup>1</sup> and not as a long-term continuing Program whose sole objective would be provision of services.

---

1. Discussion Paper, "Task Force on Service to the Public" dated July, 1980.



The problem from an evaluation perspective is which evaluation approach to take.

If the Service Bureaux had been in operation over an extended period and a level of data and assessment findings had been developed, the major evaluation issue would be:

"To what extent has the Service Bureaux Program assisted in the determination of levels of service, cost effectiveness and market penetration required to meet the needs of Canadians?"

At this early, formative stage of the Service Bureaux Program development, however, a very different major evaluation question, needs to be asked:

"Are the current program initiatives, processes and data frameworks suitably designed and executed to ensure that the efforts of the pilot projects will provide a sufficient range and depth of information to enable the determination of levels of service, cost effectiveness and market penetration required to meet the needs of Canadians?"

### 1.3 Decision Required

It is the view of the Study Team that the differences between these two basic questions are the differences between a Program and Project approach to evaluation.

A decision of the Task Force management on this issue is required for the final framing of the Assessment Evaluation Report. The draft final report, containing a more detailed



account of the study team findings has been developed. Once the management decision on the approach to Evaluation has been determined, the final report can be submitted with the terms of reference for evaluation and other supporting detail included.

The following sections include:

Section 2 - Evaluation Issues

Section 3 - Program Evaluation Options, and

Section 4 - A Project Evaluation Alternative  
Approach.





## 2. EVALUATION ISSUES

### 2.1 Introduction

Within the current guidelines and approach to evaluation issues, as supported through the Office of the Comptroller General, four main issue areas are highlighted:

- Program Rationale;
- Objective Achievements;
- Impacts and Effects; and
- Alternative Program Delivery.

The evaluation issues presented, cover all four evaluation areas of concern.

In discussion with Task Force management, however, other areas of concern were voiced, which have been included. The line between evaluation and audit-type issues may appear, therefore, to have been crossed in a number of the issues identified. The decision to include these issues was predicated partly on an awareness of the need to meet a Cabinet direction and partly in the light of our later recommendations for project-type evaluation.

### 2.2 Issues

#### 2.2.1 Design Issues

The main objective of the Service Bureaux Program is to determine the level of service, the cost effectiveness and the market penetration levels required to meet the needs of Canadians.

Based on this objective, the Task Force designed a program to enable the operation of and assessment of service approaches. It was anticipated, for purposes of the



Evaluation Assessment Study, that the Service Bureaux offices and other services under the program would be designed, located and operated, not so much to provide a pre-determined level of service, but to provide a range of different services. The purpose of this would be to determine the proper mix of locations, levels and types of services for future decisions to be made based on their findings. In order to achieve this objective, the design of the Program should be predicated upon clear criteria and carefully constructed recording and reporting mechanisms for future assessment.

The study team did find evidence of a variety of locations, of service approaches and information recording methods.

Office locations were varied but a significant question emerged as to whether Program criteria were modified or ignored in order to obtain space quickly and become operative. The role of Public works and the level of their response to Program needs and the impact of this on Program Objectives should be examined.

In the area of services provided, the study team found a variety of service approaches. The value of each different type of approach should be the provision of comparative results. Whether the means to assess service approaches exists and to what extent it is meaningful would form a key part of a subsequent evaluation.

In a similar vein, all offices visited maintained records on numbers and types of visits and enquiries. No clear evidence was found on whether the information forwarded to the Task Force was used, or that formal assessment formats were used to provide findings. The basic premise of operating the Service Bureaux Program is to utilize such findings and therefore the inclusion of this aspect of the Program in an evaluation is evident.



The issues to be resolved within the program design areas are:

- Issue #1     To what extent have Service Bureaux Program criteria been developed, adhered to and with what current results and for the future determination of operating modes and levels?
- Issue #2     To what extent has the Service Bureaux Program assisted in the determination of the market to be served and the actual levels of demand to be met?
- Issue #3     Has the development of data banks at local service levels contributed to the identification of the public needs for referral and/or access?
- Issue #4     Are the current interpretations and practices followed by the Service Bureaux Program adequate to assess the needs of Canadians?

#### 2.2.2 Service Level Issues

While it is recognized that the major objective is to identify ways and means of ultimately shaping a Program to meet Canadian needs, the effort to produce as viable a level of service as possible is also a significant part of the Program effort. Only through the best service efforts at the Pilot Project stage, can improvements or need to change be assessed honestly.

It is therefore within the scope of the evaluation to examine issues of current effectiveness of operations.

The impact of the Pilot Project modes on the public was impossible to examine within the limits placed on personal interviews at the Evaluation Assessment stage. Obviously





unless some incremental change in the level of public access or some change is reflected in the public satisfaction level, the findings from the Task Force Pilot Project must be, at the least, suspect.

A number of evaluation issues emerge from the level of service area:

Issue #5 Is there evidence that the Service Bureaux Program has resulted in incremental changes in the volume of enquiries and changes in client satisfaction that would indicate a continuing need for, or modification of Program services?

Issue #6 Are the dynamics of the Service Bureaux initiatives supportive of clients' needs:

- in walk-in offices;
- in itinerant services; and
- in carrels?

Issue #7 To what extent have the Service Bureaux Program initiatives affected the capacity of the special target groups to achieve improved levels of service (handicapped and disadvantaged)?

Issue #8 To what extent has the provision of publications been a factor in providing improved services to the public?

Issue #9 Is the current limitation of the Service Bureaux Program role (e.g. referrals only vs. referrals and information/in-person priority vs. in-person and telephone enquiry.) providing a sufficient level of service at the testing/experimental stage?



Issue #10 Has the level of advertising had an impact on the Service Bureaux Program operations and to what effect?

### 2.2.3 Program and Related Dynamics Issues

The study team devoted some attention to various dynamics that could be expected to have significant impact on the actual operation.

Under the resources and management areas the Task Force approaches to the training of staff; development of procedures and systems and general management of the Program were examined. The level of resourcing, in global terms was recorded and the views of field staff were obtained on the adequacy and timeliness of Headquarters response to their needs were discussed.

The general view is that, while the Task Force has mounted a significant Program within a pressure-creating time frame, the broad issues of training, equipping and directing, the staff have been met, albeit by a combination of planned and ad hoc decisions and actions. The issues requiring examination from a Program Evaluation perspective relate more to the continuing, future operation of the Program.

One issue that tends to stand alone pertains to the use of private contract personnel vs. the development of a public service organization to provide the staff resources.

Finally, within this area of dynamics within and without the Program, mention should be made of the Federal Departments and Agencies, Provincial/Municipal jurisdictions and Community Services. Under the terms of reference, the study team were unable to explore these areas. Interviews with Service Bureaux Program staff indicated a wide divergence of views and opinions. As the participation



levels, attitudes and roles of these groups are crucial to the ultimate provision of service, they must be part of a full evaluation.

The issues within the dynamics area are:

Issue #11 To what extent and to what effect have

- Federal Departments and Agencies;
- Provincial/Municipal jurisdictions; and
- Community Services

played a role in the Pilot Project initiatives?

Issue #12 How have internal management, training and communications affected the operation of and achievements of the Service Bureaux Program projects, both regionally and in total?

Issue #13 Is the level of and use of resourcing available, sufficient to achieve the stated objectives of the Program?

Issue #14 Should a Program of providing access/referral to the public be manned and operated through Public Service staff or through continuing private contract arrangements and what are the dynamics, benefits and drawbacks of each approach?

Issue #15 Do the office locations, layouts, image portrayal and staff dynamics in handling the public, have a bearing on the volumes and types of public use and to what effect.

The wide range of issues covered, as indicated earlier, have significance for the types of evaluation that could be considered by Task Force management. Exhibit I



has attempted to categorize the issues in terms of the OCG concerns and those more related to managements of a Pilot Project.

Section 3, following, considers the Evaluation Options, based on the Evaluation Issues we have identified.

### 3. PROGRAM EVALUATION OPTIONS

#### 3.1 Introduction

Four basic Program Evaluation Options are presented:

An Ex-Post Evaluation Option: which would measure efficiency and effectiveness to date and relate the findings to the potential of the Service Bureau Program to achieve stated objectives, including assessments of the effects of increasing or decreasing program resource levels.

An Effectiveness Monitoring Option: wherein a determination would be made of the extent to which established objectives and desired impacts were achieved.

A Management Monitoring Option: in which the design, process, criteria and data structures and the management directives and actions would be evaluated to determine the degree to which they contributed to program achievement.

A Formative Evaluation Option: involving intensive evaluation of all aspects of the Program to determine the revisions needed to ensure the relevancy of objectives and processes, the efficient use of resources and designs for alternative means of program delivery.

The above Options are outlined in summary in the following sub-sections. An option or Evaluation Approach selected by the Task Force would be detailed more extensively in the final Evaluation Assessment Report.





### 3.2 An Ex-Post Evaluation Option

#### 3.2.1 Scope

The scope of the Ex-Post Evaluation Option is to examine the relevancy of the Program's objectives, causal links and processes and to measure the efficiency and effectiveness of the Program's processes and actions.

#### 3.2.2 Purpose

The purpose is to determine:

- the plausibility of the linkage of objectives to activities and effects;
- the intended and unintended impacts of the Program;
- the levels of efficiency and effectiveness achieved;
- the degree of suplication, overlap or conflict with other programs;
- the effect of discontinuing, increasing or decreasing the resource levels; and
- the possible strengths or weaknesses within the Program.

The findings would be used to permit management to decide on the future thrusts and levels of activity for the Program.

#### 3.2.3 Methodology

The methodology, in capsule form would involve:

- an internal detailing of data resources, processes, criteria, performance indicators, resourcing and an assessment of each of the above elements.



- an extensive survey of client areas to determine client satisfaction levels;
- an intensive series of interviews with all interacting programs and services; and
- detailed cost-effective analysis of alternative levels of resourcing.

#### 3.2.4 Estimated Duration and Study Level

The study would involve 4 - 5 months of detailed, concentrated work, involving a minimum of three consultants and several survey/questionnaire approaches. The estimated cost would be in the 50/60 thousand dollar range.

### 3.3 An Effectiveness Monitoring Option

#### 3.3.1 Scope

The scope of Effectiveness monitoring Evaluation would be to determine to what extent were established objectives and desired impacts achieved.

#### 3.3.2 Purpose

The purpose of Effectiveness monitoring is to test the:

- effectiveness measurement data from Program and users;
- objectives criteria;
- cost indicators; and
- other possible impact results.

The findings would be used to present the current achievement levels of the Program and their applicability for the future.



### 3.3.3 Methodology

The methodology would involve:

- detailing the Program measures of effectiveness and their relation to the objective and desired impacts;
- testing through review of existing data and survey of users, the validity of performance data;
- assessing the relative cost effectiveness of the results obtained by cost/benefit analysis; and
- conducting analysis of the proven results against Program criteria.

### 3.3.4 Estimated Duration and Study Level

The monitoring of effectiveness would involve 2 to 5 months of two consultants and limited survey work. The estimated cost would be in the 25/30 thousand dollar range.

## 3.4 A Management Monitoring Option

### 3.4.1 Scope

The scope of this Evaluation Option is narrower and primarily targeted at the efficiency areas of the Program, but with an examination of the management policies and practices as they relate to Program effectiveness included.

### 3.4.2 Purpose

The purpose is to determine within the accepted objectives, causal links and existing processes:

- the degree to which resources and program processes were utilized within planned levels of activity; and





- the extent to which management control and direction affected the achievement of results.

The products of this evaluation option would provide management with recommendations for and insights into the Program management changes needed to improve direction and control.

#### 3.4.3. Methodology

The methodology would encompass:

- systems design analysis;
- measurement data usage analysis;
- control mechanism assessment;
- interviews of staff at all levels;
- detailed analysis of budgets, costs and utilization; and
- an analytical comparative review of Program plans and performance results.

#### 3.4.4 Estimated Duration and Study Level

The study of Program Management would involve 2 to 3 months of work, involving two consultants, travelling to regional bureaux offices for interviews and file/records search and analysis. The estimated cost would be in the 25/30 thousand dollar range.

### 3.5 A Formative Evaluation Option

#### 3.5.1 Scope

Formative evaluation is an intensive evaluation involving all aspects of the Program and stressing and developing alternative models for program delivery including reframing of objectives, criteria, processes, data base and activities as deemed necessary.



### 3.5.2 Purpose

The purpose of formative evaluation is to determine the revisions needed to the Program's objectives, causal linkages and processes to ensure their relevancy, the efficient use of resources and to ensure the impacts and effects meet desired levels.

### 3.5.3 Methodology

The methodology, in brief, would involve:

- extensive research of files, documents, decisions to analyse rationale and linkage of the Program;
- an intensive detailing of processes, criteria, data sources, performance indicators, resourcing and assessment of these elements;
- an intensive survey of users, inter-acting agencies and departments to determine effectiveness of the Program;
- examination and analysis of other similar programs in Canada and elsewhere to determine program delivery designs; and
- detailed modelling and cost implication analysis to determine effects of proposals.

### 3.5.4 Estimated Duration and Study Level

The study, by its intensive nature would take 5/6 months and would involve both consultants and technical design experts and extensive survey/interview time and coverage. The estimated costs would be in the 60/80 thousand dollar range.



### 3.6 A Recommended Evaluation Option

It should be noted that, in the options presented, no mention has been made of advantages and disadvantages under each option.

This approach has been adopted in order that all of the options might be discussed within this section. The unique and formative nature of the Service Bureaux Program has, in our view, dictated this approach.

Evaluation Options 3.1 and 3.4 for forms of intensive evaluation, while perfectly valid options for the Program (even in its early stage of development), have disadvantages that outweigh the obvious advantages of seriously examining the Program and re-orienting it as early as possible. The major and over-riding disadvantage is the lack of sufficient performance data and historical context to either support or refute Program change at this time. If however, Task Force management were to be faced with a deferral on evaluation for any period exceeding one year, then either of the options should be considered.

Option 3.2 which deals with effectiveness-to-date monitoring has the distinct advantage of providing senior levels a modicum of feed back on which to base decisions on future funding and activity levels. The disadvantages of using effectiveness monitoring lie in the areas of data reliability and applicability and in the relative short life span of the Program. This option could be used for evaluation, with limited success, within a six month future start-up time frame.

The study team recommends that, if the Program evaluation approach is used, the 3.3 Option for a Management Monitoring type of evaluation would be the most beneficial. The advantages of this option are that it will provide sufficient



effectiveness information to meet resource planning needs but the main focus would be improvements within accepted current objectives and structure. The disadvantages tend to reflect the constant for each option and relate to the limited data and time of existence of the Program. These, however, are less significant under the Management Monitoring Evaluation Option.

Each of the options presented, including the preferred options, would deal, to a greater or lesser degree with all 15 evaluation issues. The detail of the extent to which each issue would be explored will be highlighted in the option selected by management.

#### 4. A Project Evaluation Alternative Approach

The question of determining between "Program" and "Project" evaluation is not merely a semantic problem.

Program Evaluation, by definition embraces two key fundamentals that must be explored definitively.

- Program Rationale, and
- Program Alternatives.

The study team do not believe that either of these areas require exploration at this point in the life of the Service Bureaux Program.

Conversley Program Evaluation, by definition avoids an overlap with management audit concerns on systems and procedures in a compliance sense.

In this area the study teams believes some elements of management's practices and resourceful meeting of objectives should be reflected in studying the challenge and response to the bureaucratic processes, normally reported through management audit studies.





Within a Project Evaluation the rationale for the Program is accepted and similarly alternatives to the current Program design and delivery are produced as by-products rather than a focused effort.

Project Evaluation would provide products directly related to the present and future management of the Pilot Projects.

Such questions as:

- the suitability of the design and location of offices;
- the effect of signage and image portrayed through furnishings etc;
- the staff approaches to various publics;
- the contract staff vs. public service staff;
- the organizational issues affecting the Program; plus
- the range of evaluation issues normally associated with "Objectives Achievement" and "Impacts and Effects" under program evaluation.

The freedom to design the evaluation to more immediate needs of management in resource planning, internal process/ data adjustments and managerial improvements, seems better suited to a Program that:

- has recently been introduced;
- has a varied range of approaches;
- is designed to provide answers, but also provide service; and
- has the vitality and ability to adapt, inherent in the Pilot Project Approach.

The obvious disadvantage is that the weight of approval in approach from the Office of the Comptroller General would be missing. The study team believes very strongly however that,



within Program Evaluation Concepts we should declare the Program as not evaluable, given its embryo status.

Through Project Evaluation it is possible to develop, along with evaluation findings, an Evaluation Framework for a future, more intensive Program Evaluation.

The duration of the proposed Project Evaluation would be 3/4 months, at an estimated range of 30/35 thousand dollars.



EXHIBIT 1: SUMMARY OF ISSUES BY PROGRAM EVALUATION  
CRITERIA AND RELATED PROJECT EVALUATION CONCERNS

PROGRAM EVALUATION CRITERIA

Program Evaluation Issues	Program Rationale	Objectives Achievements	Impacts & Effects	Alternative Program Delivery	Related Project Evaluation Issues
Issue #1. To what extent have Service Bureaux Program criteria been developed, adhered to and with that current results and for future determination of operating modes and levels?	X				What criteria? Whose responsibility? What impact on Service Bureau modules and service provided e.g. locational decisions, enquiry volumes, client types?
Issue #2. To what extent has the Service Bureaux Program assisted in the determination of the market to be served and the actual levels of demand to be met?		X	X		Publics identified? Market analysis conducted? Potential market penetration determined? What impact on locational variables, pilot project cost, supplies, personnel?
Issue #3. Has the development of data banks at local service levels contributed to the identification of the public needs of referral and/or access?			X		What resource materials are used in data bank development? At what cost? With what effect? How are the data banks organized? What are the priorities for data bank development, identifying contacts and updating information records? Availability of Regional/local contacts? Enquiry client satisfaction and feedback to Service Bureaux?





EXHIBIT 1: SUMMARY OF ISSUES BY PROGRAM EVALUATION  
CRITERIA AND RELATED PROJECT EVALUATION CONCERNS

PROGRAM EVALUATION CRITERIA

<u>Program Evaluation Issues</u>	<u>Program Rationale</u>	<u>Objectives Achievements</u>	<u>Impacts &amp; Effects</u>	<u>Alternative Program Delivery</u>	<u>Related Project Evaluation Issues</u>
Issue #4 Are the current interpretations and practices followed by the Service Bureaux Program adequate to assess the needs of Canadians?		X			Is the intent of the project understood by Task Force participants? Is appropriate project data being collected, analyzed and reported to Task Force management? Has implementation of Service Bureau modules as well as location, personnel and promotion decisions provided a sound basis for examining the needs of Canadians for Federal program and service information?
Issue #5 Is there evidence that the Service Bureaux Program has resulted in incremental changes in the volume of enquiries and changes in client satisfaction that would indicate a continuing need for, or modification of Program services?	X				Service Bureaux project data on enquiry volumes captured, analyzed and reported? Client market(s) being served identified? e.g. new demand vs. existing departmental enquiries. Satisfaction of Service Bureaux project clients monitored and reported regularly? Continuing demand for Federal program and service information? Impact on Federal Departments/agencies and other information sources?
Issue #6 Are the dynamics of the Service Bureaux initiatives supportive of clients needs - in walk-in offices - in itinerant services - in carrels?		X			Do existing criteria of Service Bureau modules support client service demands? Are the dynamics of Service Bureaux initiatives understood by Task Force participants? Service Bureau modules properly located, placed and staffed? Service Bureau modules of appealing design? Service Bureau modules promote client approach and interaction? Client demand, satisfaction & feedback monitored, with what results?



EXHIBIT 1: SUMMARY OF ISSUES BY PROGRAM EVALUATION CRITERIA AND RELATED PROJECT EVALUATION CONCERNS

PROGRAM EVALUATION CRITERIA

Program Evaluation Issues	Program Rationale	Objectives Achievements	Impacts & Effects	Alternative Program Delivery	Related Project Evaluation Issues
Issue #7 To what extent have the Service Bureau Program initiatives affected the capacity of the target groups to achieve improved levels of service (handicapped and disadvantaged)?		X			What target groups? Are the Service Bureau modules properly designed, located & placed? e.g. Special features? Are the Service Bureau modules accessible? Do the Service Bureau modules project an appropriate image? Is the service promoted in the appropriate communities?
Issue #8 To what extent has the provision of publications been a factor in providing services to the public?				X	Task Force policy & directives clear and understood? Impact on public perception of Service Bureau modules? Impact on staff and motivation? Client demand for publications monitored and analyzed? Availability of publications? Range of publications selected? At what cost? Storage? Access and distribution arrangements?

Issue #9 Is the current limitations of the Service Bureau Program role (e.g. referrals only vs. referrals and information/in-person priority vs. in-person and telephone inquiry) producing a sufficient level of service at the testing/experimental stage?

X

X

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EXHIBIT 1: SUMMARY OF ISSUES BY PROGRAM EVALUATION CRITERIA AND RELATED PROJECT EVALUATION CONCERNS

PROGRAM EVALUATION CRITERIA

Program Evaluation Issues	Program Rationale	Objectives Achievements	Impacts & Effects	Alternative Program Delivery	Related Project Evaluation Issues
Issue #10 Has the level of advertising had an impact on the Service Bureaux Program operations and to what effect?		X		X	Client markets identified? Appropriate media selected? Promotion projects appropriate image of Service Bureau modules? Appropriate client data captured? Socio-experimental design to promotion eg. advertising/no advertising of sites?Alt. means? Clientfeedback? Visibility of Service Bureau modules? Response of other information agencies eg. Department? Impact on supply of information eg. public actions? Changing distribution of enquiries eg. in-person, telephone, other?
Issue #11 To what extent and to what effect have -Federal Departments & Agencies; -Provincial/Municipal jurisdictions; and - Community Services played a role in the Pilot Project initiatives?		X			Consultation on information issues? No. of contacts? Integration of Service Bureau modules into information community? Commitment of other information groups to Service Bureaux initiatives? Impact on information service role, data base, personnel (training, motivation) and location of Service Bureau modules?
Issue #12 How have internal management, training and communications affected the operation of and achievements of the Service Bureaux Program projects, both regionally and in total?			X		Administration, financial and service guidelines implemented and understood? Availability of management reports eg. operations, budgets? Training sessions/coverage of Task Force participants? Impact on Service Bureaux operations eg. service role, data bank, departmental contacts, data collection, staff motivation and administrative arrangements?





EXHIBIT 1: SUMMARY OF ISSUES BY PROGRAM EVALUATION CRITERIA AND RELATED PROJECT EVALUATION CONCERNS

PROGRAM EVALUATION CRITERIA

Program Evaluation Issues	Program Rationale	Objectives Achievements	Impacts & Effects	Alternative Program Delivery	Related Project Evaluation Issues
Issue #13 Is the level of and use of resourcing available, sufficient to achieve the stated objectives of the program?		X	X		Resources per Service Bureau module appropriate eg. design costs, staffing salaries/benefits, supply and requisition expenses? Impact on the availability and access to information services by the public? Appropriate image of Service Bureau modules and Federal Government projected?
Issue #14 Should a program of providing access/referral to the public be manned and operated through Public Service staff or through continuing private contract arrangements and what are the dynamics, benefits and drawbacks of each approach?		X		X	Potential administrative requirements analyzed eg. Classification, staffing, staff relations, public affairs? At what cost? Impacts on staff motivation experience and expertise? Appropriate image of Service Bureau modules and Federal Government projected? Impact on working relations with Departments and other information agencies?
Issue #15 Do the office locations, layouts, image, portrayal and staff dynamics in handling the public, have a bearing on the volumes and types of public use and to what effect?		X		X	Data on enquiries captured, analyzed and impacts of design and locational variables assessed eg. suburban mall vs. urban core store front location? Client market(s) identified? Service Bureau modules adequately and appropriately promoted? Client satisfaction monitored and feedback solicited? Task Force policy and guidelines implemented and understood by Task Force participants?









